Scale up Solutions & Training

TJP Consulting

TJ, JA, PS 5/14/21 EDUC 768

Project Changes & Reflections

Project Scope

Throughout the project we realized that we needed to reduce the scope in order to meet our deadlines. We decided to go back and remove the job aid as a deliverable within the scope of this project. We amended documents in module 3 to reflect this change. We also amended the change request form as that document referenced the job aid.

While working on the Instructor Guide we determined that it was important to add a participant guide to the synchronous training. This was then added to our project scope. We amended the module three documents to reflect this addition.

Understated Timelines

Form the beginning of the project we understanded the timelines. We had originally estimated a four - five week time frame in the Gap Analysis. We eventually returned to alter this to a nine - ten week timeframe which was more suitable for the project.

Objectives

While working on Module seven, we realized there was room for improvement in the way we worded our terminal and enabling objectives. We eventually returned to the Module five documentation to update this change.

Table of Contents

TJP Consulting
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Scale Up Solutions & Training

Module One: Team Charter

Team Members

Names

T.J.

J.A.

P.S.

Meeting Tool

- Zoom. Mondays @ 7:30 pm EDT

Team Values and Behaviors

- Empathy. Honesty. Accountability.

Collective Expectations

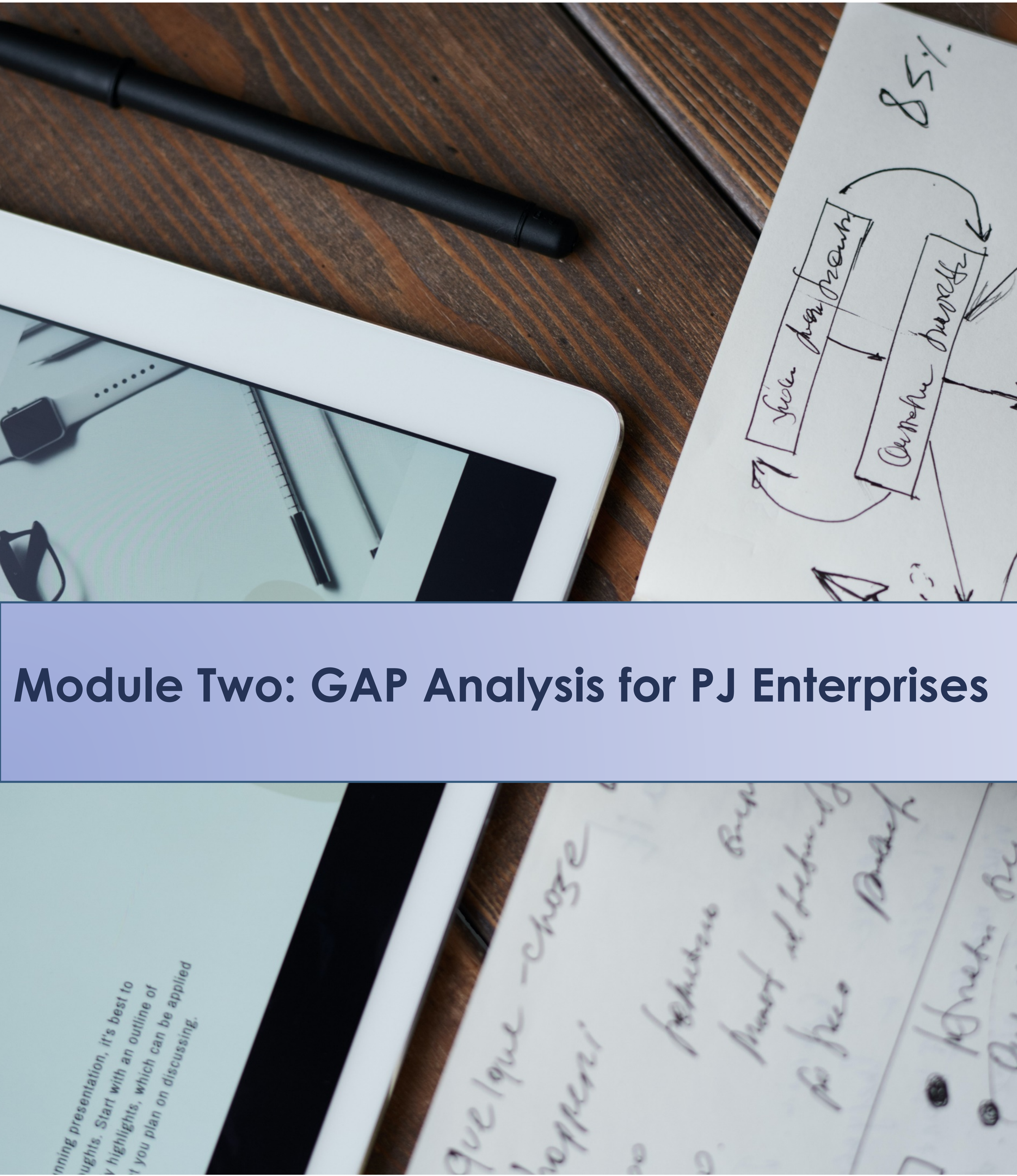
- Of course, life happens, so open communication is important. Let team members know if you cannot participate in meetings or complete assignments as soon as possible so other arrangements can be made.
- All opinions will be listened to, but inevitably, there will be disagreements about plans of action and assignments. Team members should try to be flexible and open to alternatives. If the assignments are complete as specified by the instructor and the work "looks good," then we can be satisfied with a job well done even if one's preference wasn't used.

Method for Handling Participation Issues

- Communicate team values, behaviors, and expectations if they are not being observed.
- Let the instructor know if there are several instances of one not showing up or completing assignments.

Miscellaneous Rules

- Ample notice for missing meetings: 24 hours' notice.
- Meetings will begin within 5 minutes of the scheduled time.
- Going forward, cameras will be used.
- J.A. will submit assignments to the instructor.
- Agenda will be decided at the end of a meeting for the subsequent meeting.



Module Two: GAP Analysis for PJ Enterprises

Team Responsible: TJP Consulting (Team 1)

PS: Project Manager

TJ: Trainer and SME

JA: Instructional Designer and SME

Narrative Summary:

PJ Enterprises is a mail-order company that specializes in gifts, apparel, and home accessories. For the upcoming year, PJE has four goals including reaching or exceeding their projected sales, customer lists, and profit targets as well as improving customer-service scores, work environment, and staff development opportunities. The company is experiencing several issues in these areas including customer loss because of poor customer service, employee dissatisfaction and high employee turnover, and challenges related to the hiring and training of new employees. We the consultants at Team#1 Design have identified several ways in which we can help PJ Enterprise reach their goals this year. A combination of employee training initiatives and work aids are being recommended.

Performance Issue	Current State (As-Is)	Implications of the As-Is.	End Goal (To-Be)	Vision for Bridging the Gap (How)	Est Timeline
1. Slow call response (lack of product knowledge)	3 per hour	Slow call response leads to unsatisfied customers and customer attrition	6 per hour	Training Work Aid (digital upgrade) Incentives	4-5 weeks
2. Improper phone etiquette	**2 out 3 customers complained about the phone operators** **Phone not answered fast enough, lack of operator knowledge, possible rudeness, etc.**	**Bad etiquette leads to customer attrition**	**10% increase in customer-service scores** **Phone answered promptly, operators knowledgeable about products and processes, politely engaging with customers**	**Training** **Incentives**	**9 - 10 weeks**

3. Challenges with the recruiting, selection, and hiring of new people	High staff turnover: 15% of staff lost every year	Loss of institutional knowledge, high training costs, low morale	Reduce turnover in year 1 by 25%	Training (help HR find employees better suited for the positions)	3-4 weeks
4. Lack of onboarding training resulting in challenges with employee engagement	New employees are informed about HR policies and products but not much else.	Lack of initial training can lead to disengagement with the job, confusion on deliverables, low performance	A 20% increase in positive employee satisfaction surveys after completing a well-design onboarding course	Training (onboarding course)	5-6 weeks
5. Effective management practices	**More than ½ of telephone operators indicated dissatisfaction to the point of leaving**	**The dissatisfaction can lead to unhappy customers**	**20% Improvement in employee satisfaction**	**Training (management coaching strategies and other soft skills) Clearer policies for employees**	**9 - 10 weeks**

Module Three: Project Charter

Project Information:

Based on an initial need's analysis, TJP Consulting has been hired by PJ Enterprises to design, develop, and deliver a learning program for the telephone operators. PJ Enterprises is looking to refine their mail-order catalogue training. This training is currently done 4 times per year, once for each time a new catalogue launch. PJ Enterprises believes improved product knowledge will result in an improved customer experience. The training course is intended to be delivered before each of the catalogs are mailed out (four times per year). The target trainees are the customer-service supervisors and the telephone operators.

Project Name: Scale up Solutions & Training
Project Sponsor: CEO – Axel Rose
Project Owner: Director of HR, Pat Jones

Stakeholders
Catalog director, Judie Thompson
Merchandising manager, Sheena Perez
CEO – Axel Rose
Director of HR, Pat Jones
SME (Subject Matter Expert) Survey

Business Case

PJ Enterprises is a mail-order company that specializes in gifts, apparel, and home accessories. For the upcoming year, PJ Enterprises has four goals including reaching or exceeding their projected sales, customer lists, and profit targets as well as improving customer-service scores, work environment, and staff development opportunities. The company is experiencing several issues in these areas including customer loss because of poor customer service, employee dissatisfaction and high employee turnover, and challenges related to the hiring and training of new employees. TJP Consultants will focus on employee satisfaction and customer service.

Our main solutions will include:

- Shifting to a train the trainer mentality. The Catalogue Director and Merchandising Manager will empower the customer service supervisors to train their respective teams on catalogue items. Customer Service Supervisors will actively communicate with telephone operator on an ongoing basis. This will replace the traditional one-way training provided quarterly. This shift will encourage a learning environment, increase the telephone operator's engagement with training and ultimately their product knowledge.

- Situational Training beyond only catalogue items. One of the issues identified by management, indicate an increase of 30 percent in customer complaints with the telephone operators and improper phone etiquette. The quarterly training will include "what if scenarios" which will allow the telephone operator to refine the quality of their responses.
- Efficient and timely access to the training materials for the telephone operators through E-Learning Modules. Operators will be able to inform themselves of the upcoming catalogue items/features and download important pre-work materials prior to training. A more structured e-learning training will aim to increase the response rate of each telephone operator from 3 calls per hour to 6 calls per hour while reducing the number of calls sent to customer service supervisors and reducing customer complaints from the current 67% to 57% within 1 month of the initial training.
- A thorough baseline evaluation of Employee Engagement across all working groups at PJ Enterprises in order to evaluate current management practices. An analysis will be conducted and recommendations on how to improve employee engagement beyond training initiatives will be provided.

Business Objectives

Employee attrition/ dissatisfaction leads to lack of commitment and engagement of customer service supervisors and telephone operators. Based on our initial analysis small changes in the way in which the catalogue training is designed and delivered can help to improve employee satisfaction. This will lead to higher engagement, resulting in higher retention of customer service supervisors and telephone operators at PJ Enterprises. Higher retention will have a direct result for customer service supervisors by improving management practices and product knowledge retention. This improvement in management practices will lead to higher retention & engagement in telephone operators resulting in improved response rates, reduced calls sent to supervisor's product knowledge, phone etiquette and customer service scores. Further analysis of employee engagement, by means of our employee engagement survey will result in recommendation to further improve communication, create clearer policies, and identify staff development opportunities. Our focus on employee engagement and customer service are expected to achieve the following results:

- *More than 50% of telephone operators indicated dissatisfaction to the point of leaving. Our solutions will result in a 20% improvement in employee satisfaction within a 6-month timeframe.*
- 67% of customers complained about the phone operators. Our improved design and delivery of the catalogue training will result in a 10% improvement in customer service scores within a 1-month timeframe and 50% improvement in customer satisfaction within 4 months.

Project Deliverables

Training Deliverables

SCORM compliant training module (blended delivery course)

- Asynchronous e-learning component 2 hour (4 x 30-minute modules) on phone etiquette and catalogue items.
- Synchronous 3 hours: Role play, case studies – other soft skill training. One time facilitation by TJP Consulting subsequent training done by Customer Service Supervisors.
- Digital completion certificates for the manager training and a completion certificate template for the operators

Non-Training Deliverables

Employee engagement survey and analysis report which will detail recommendations to further improve communication, create clearer policies and identify staff development opportunities.

Project Scope

In Scope

The project scope includes:

- Analysis for and development of a two-hour SCORM-compliant e-course on phone etiquette
- ~~Three hours~~ Six Hours of In-person training for the managers to empower them to train their operators on catalogue items
- Review periods with the HR director and TJP trainer and instructional designer to discuss learning objectives for the asynchronous and synchronous training, storyboards for the asynchronous training, and the final product
- A participant guide for the synchronous training
- Digital certificates for the manager training; design of completion certificates for operators.
- Analysis for and creation of an employee engagement survey, one-time deployment of the survey, an analysis of the results with recommendations.

Out of Scope

The project scope does not include:

- Future updates to e-learning modules or synchronous training materials
- Hosting of the modules. Recommendations can be provided but no set up or administration.
- Tracking of employee engagement and completion

- In-person training for operators
- Operator certificate distribution
- Employee engagement survey cannot be re-deployed within the scope of this project.
- Changes above what has been stated in the In-Scope section are subject to hourly rates and development costs.

Project Completion Criteria

- 2-hour E-learning modules
- All digital materials for synchronous training provided.
- Employee engagement results and report with recommendations.
- All project documentation provided with expense summary.
- Stakeholder satisfaction survey results and report.

Project Milestones

Milestone (Deliverable #1)	Date	Estimated Cost
Analysis of training needs	1.5 Weeks	$400
Goal and Task analyses, Write Objectives, Alignment Chart	1 Weeks	$320
Design Storyboards	1.5 Weeks	$800
Asynchronous Development (course shell created and navigable,)	2.5 Weeks	$2400
Synchronous Development (Instructor & Participant guide developed)	2 Weeks	$1200
Implementation (Managers' training - synchronous)	1.5 Days	$1440
Implementation (Asynchronous Modules)	1.5 Days	$160
Evaluation	1.5 Days	$160
Final Implementation	1 Day	$80
		Total: $6960

Milestone (Deliverable #2)	Date	Estimated Cost
Analysis	1 Week	$800
Design Survey	1.5 days	$240
Deploy Survey to employee groups	1 day	$160
Analysis of survey results and report writing	1.5 days	$480
1.5-hour session on report results with management	1 day	$240
		Total: $1920

Risks

Risk Area	Likelihood	Risk Owner	Project Impact-Mitigation Plan
Attrition	High	PJ Enterprises	Train the trainer to build capacity
Attrition	Low	TJP Consulting	Outsource deliverable, build in extra time for development
Incompatible technology	Medium	Both	Consultants need to build something they can use. Context analysis should be done during the analysis phase
Technological advances	Medium	Both	Evaluation of their technology

Risk Area	Likelihood	Risk Owner	Project Impact-Mitigation Plan
during the project timeline			advancement plans over the next 3 years
Pandemic	High	Both	Plan for various training modalities

Assumptions

In the following assumptions, PJ Enterprises will be referred to as the "Customer," TJP Consulting will be regarded as "Consultants," and PJ Enterprises managers and operators will be referred to as "Attendees."

- Once trained, PJ Enterprises managers will deliver training to operators and other managers.
- PJ Enterprises Operators will complete both asynchronous and synchronous training.
- The Customer has the technological infrastructure in place to host the face-to-face or remote synchronous sessions.
- The Customer will make all the necessary arrangements for their employees to attend training.
- The Customer will provide all training equipment, including desktops and laptops, for all attendees.
- The Customer will pay their employees for the duration of the training.
- The attendees will be able to access the asynchronous training at any time, including during their shift.
- Consultants will deliver the Train the Trainer synchronous training during 9 am – 5 pm business hours.
- Customer's testing of the training environment is to be completed before the Consultants deliver the training.
- The Customer will have an IT Resource on standby to troubleshoot any technical issues during the training.
- At least 80% of employees will complete the employee engagement survey.
- The Project Owner will sign off on all milestones.
- Consultants will outsource parts of work to trusted vendors.

Constraints

TJP Consulting will adhere to the following constraints:

- Asynchronous training offering will be SCORM compliant.
- All training will meet Government Accessibility Standards.
- The project completion budget is $8880.
- The project completion deadline is May 14, 2021.
- The project completion is within scope.
- The project outcome satisfies the Customer.

External Dependencies

Successful completion of the project is dependent on the following external dependencies:

- PJ Enterprises' chosen Learning Management System is compatible with the asynchronous training delivered by TJP Consulting.
- TJP Consulting is reliant on all of PJ Enterprises' technology upgrades or changes to be completed.

Vendor Assistance Required

To meet the needs of the project, TJP Consulting may outsource various functions of the project. Outsourcing could include graphic design, script development, survey development, and interpretation of survey results.

Approvals

Role	Signature	Date
PS: Project Manager		
TJ: Trainer and SME		
JA: Instructional Designer and SME		
Pat Jones: Director of Human Resources		

Module Four: Scope Management Plan

Introduction

The Scope Management Plan provides the scope framework for this project. This plan documents the scope management approach; roles and responsibilities as they pertain to project scope; scope definition; verification and control measures; scope change control; and the project's work breakdown structure. Any project communication which pertains to the project's scope should adhere to the Scope Management Plan.

This project has two major deliverables. The first deliverable is designing and delivering a new blended format training method (SCORM Compliant e-learning module and ~~three hours~~ six hours of synchronous training) which will be used once a quarter to train employees on new catalogue items and proper etiquette. This includes design of the e-learning module, all programming and coding, and testing/validation of the module. No external resources or outsourcing are anticipated for this deliverable. The second deliverable is the development, execution, and synthesis of an employee engagement survey as well as a recommendations report. This includes design of the survey, distribution to all working groups at PJ Enterprises, synthesis of the results and a recommendations report. We anticipate the need to outsource a survey design specialist.

Scope management approach

For this project, scope management will be the sole responsibility of the Project Manager, PS. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The project Charter will serve as the Statement of Work and details all important information regarding the project and deliverables.

The Project Manager (PS), Sponsor (Axel Rose), Project Owner (Pat Jones) and Stakeholders (Customer Service Supervisors, Sheena Perez and Judie Thompson) will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements. The project will undergo multiple checkpoints, as outlined in the communications plan.

Throughout the project lifecycle proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team. The project team includes TJ (Trainer and Subject matter Expert) and JA (Instructional Designer and Subject Matter Expert). All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request, the Project Manager will submit the scope change request to the Project Sponsor, Axel Rose for acceptance. Upon approval of scope changes by the Project Sponsor, the Project Manager will update all project documents and communicate the scope change to all stakeholders and team members. Based on feedback and input from the Project Manager and Stakeholders, the Project Owner is responsible for the acceptance of the final project deliverables and project scope.

Roles and responsibilities

The Project Manager, Sponsor, Owner and team will all play key roles in managing the scope of this project. As such, the project sponsor, owners, manager, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope throughout the entire duration of the project. The table below defines the roles and responsibilities for the scope management of this project.

Name	**Role**	**Responsibilities**
Axel Rose	Sponsor	Approve or deny scope change requests as appropriate. Accept overall project deliverables
Pat Jones	Project Owner - VP HR	Signs off on agreed upon milestones (ETA/S & EES) Evaluate need for scope change requests Approve or deny scope change requests as appropriate (ETA/S & EES).
Lee Hill	Project Owner – Training Director	Signs off on agreed upon milestones (ETA/S) Evaluate need for scope change requests Approve or deny scope change requests as appropriate (ETA/S).

Name	Role	Responsibilities
Customer Service Supervisors (4)	Project Owners (Etiquette Training)	Consulted for common complaint scenarios (ETA/S) Consulted on training practices. Accepts/Rejects work product (scenarios ETA/S)
Sheena Perez and Judie Thompson	Project Stakeholders (Catalogue)	- Consulted for product information (Catalogue items ETA/S)
PS	Project Manager	Measure and verify project scope. Facilitate scope change requests. Facilitate impact assessments of scope change requests. Organize and facilitate scheduled milestone approval meetings with appropriate project owners. Organize and facilitate scheduled change control meetings. Communicate outcomes of scope change requests. Update project documents upon approval of all scope changes
TJ	Trainer and SME	Measure and verify project scope. Validate scope change requests. Participate in impact assessments of scope change requests. Communicate outcomes of scope change requests to team.

Name	Role	Responsibilities
JA	Instructional Designer and SME	Participate in defining change resolutions. Validate scope change requests. Evaluate the need for scope changes and communicate them to the project manager as necessary Communicate outcomes of scope change requests to team.

TABLE 1.1, SCOPE MANAGEMENT ROLES AND RESPONSIBILITIES

Scope definition

The scope for this project was defined through a comprehensive requirements collection process. First, a thorough gap analysis was performed on the company's current business practices.

Further analysis was conducted with a report that outlined issues as identified by management. From this information, the project team developed a charter to identify what the training and employee engagement survey would accomplish.

The project description and business deliverables were developed based on the requirements collection process and input from subject matter experts in instructional design, training and development and an organizational behaviorist. This process of expert judgment provided feedback on the most effective ways to meet the original requirements of providing a new training for catalogue items from which the company can also improve its engagement and retention practices thus improving the overall customer experience.

Project scope statement

The project scope statement provides a detailed description of the project, deliverables, constraints, exclusions, assumptions, and acceptance criteria. Additionally, the scope statement includes what work should not be performed in order to eliminate any implied but unnecessary work which falls outside the of the project's scope.

This project includes two major deliverables. The first deliverable is the design and delivery of a

(1) SCORM compliant training module, six hours of synchronous training. The deliverable does not include subsequent e-learning modules or synchronous trainings that may be required at the on-set of the next catalogue launch.

(2) The second and final deliverable is an employee engagement survey and analysis report which will detail recommendations to further improve communication, create clearer policies and identify staff development opportunities. PJ Enterprises assures that at least 80% of current employees will complete the employee engagement survey within 10 business days of deployment.

This project will be accepted once the training has been deployed on company software without any lags or access issues. This project does not include ongoing operations and maintenance of the e-learning module. Only internal personnel and resources may be used for this project.

Additionally, the project is not to exceed the May 14th, 2021 deadline or $8,800 in spending.

Assumptions

Multiple assumptions have been made for this project. TJP assumes that support will be provided by the project sponsors and owners and that adequate internal resources are available for the successful completion of this project. We define adequate internal resources as the cooperative participation of all stakeholders, employees, and IT support.

PJ Enterprises will provide all training equipment, including desktops and laptops, for all attendees and will have an IT resource on standby to troubleshoot any technical issues during the synchronous training. TJP Consulting will deliver the Train the Trainer synchronous training during 9 am – 5 pm business hours. Once trained, PJ Enterprises customer service managers will deliver training to operators and other managers. PJ Enterprises will make necessary arrangements, including time paid and access to asynchronous and synchronous training during work hours.

Work breakdown structure

In order to effectively manage the work required to complete this project, it will be subdivided into individual work packages. This will allow the Project Manager to more effectively manage the project's scope as the project team works on the tasks necessary for project completion. The project is broken down into three categories: the training category; the survey category; and the project manager category. Each of these categories is then subdivided further down to work packages which will help to chunk out the action items into manageable deliverables (see WBS structure Figure 1.1).

In order to more clearly define the work necessary for project completion the WBS Dictionary is used. The WBS Dictionary includes an entry for each WBS element, relevant to each separate category and deliverable. The WBS Dictionary includes a detailed description of work for each element and the deliverables, budget and resource needs for that element. There are 5 separate WBS Dictionaries for each major category of the project. The project team will use the WBS Dictionary as a statement of work for each WBS element. (See addendum item 1.1)

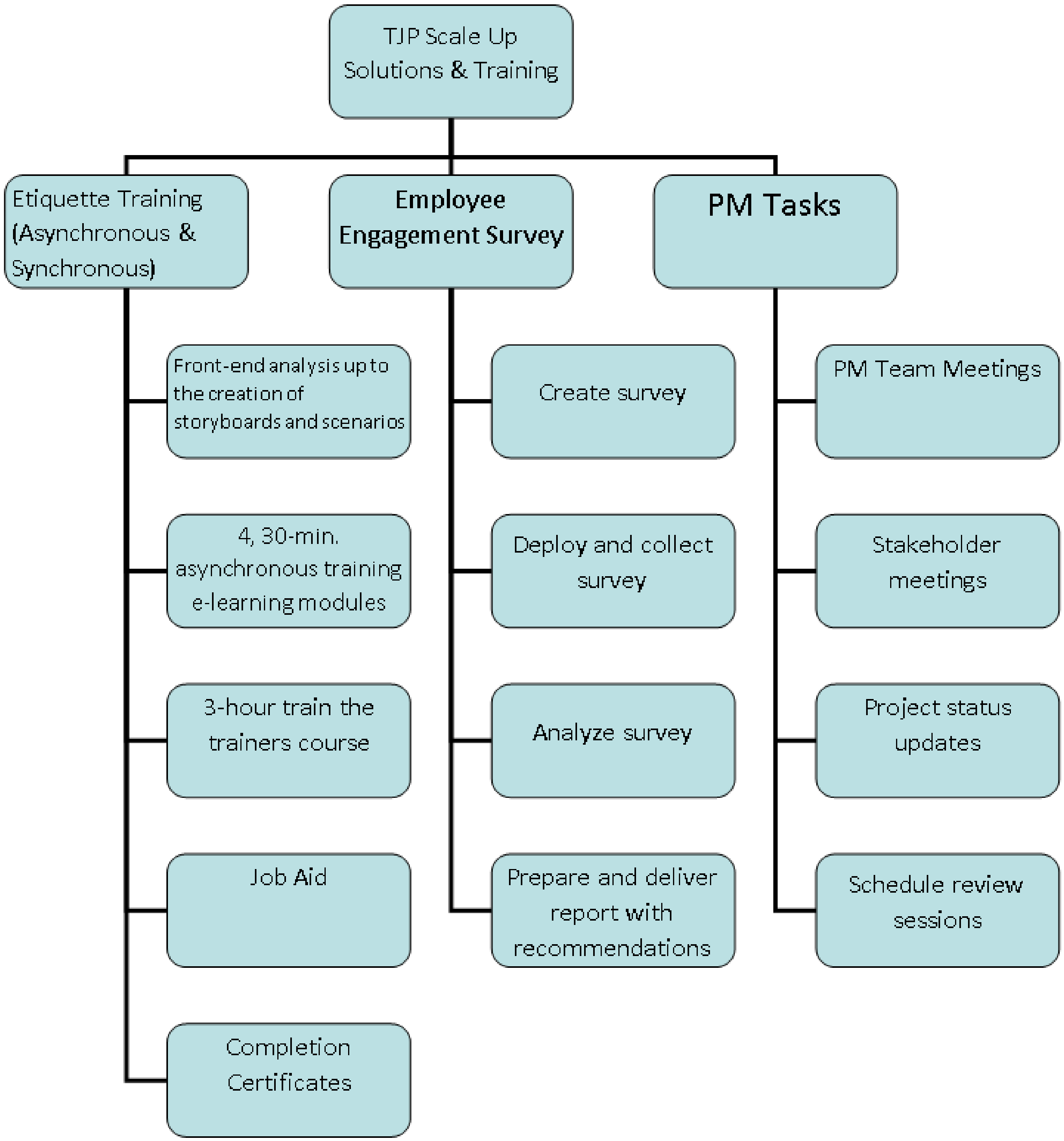


Figure 1.1 Work Breakdown Schedule [(WBS Form, Sourced from EDUC768 Course Template)]

Scope verification

As this project progresses the Project Manager will verify interim project deliverables (milestones) against the original scope as defined in the scope statement, WBS and WBS Dictionaries. Once the Project Manager verifies that the scope meets the requirements defined in the project plan, the Project Manager and Owner(s) will meet for formal acceptance of the deliverable. During this meeting the Project Manager will present the deliverable to the Project Owner for formal acceptance. The Project Owner will accept the deliverable by signing a milestone acceptance document. This will ensure that project work remains within the scope of the project on a consistent basis throughout the life of the project.

Scope control

The Project Manager and the project team will work together to control of the scope of the project. The project team will leverage the WBS Dictionary by using it as a statement of work for each WBS element. The project team will ensure that they perform only the work described in the WBS dictionary and generate the defined deliverables for each WBS element. The Project Manager will oversee the project team and the progression of the project to ensure that this scope control process is followed.

If a change to the project scope is needed, the process for recommending changes to the scope of the project must be carried out. Any project team member or sponsor can request changes to the project scope. All change requests must be submitted to the Project Manager in the form of a project change request document. The Project Manager will then review the suggested change to the scope of the project. The Project Manager will then either deny the change request if it does not apply to the intent of the project or convene a change control meeting between the project team and Sponsor to review the change request further and perform an impact assessment of the change. If the change request receives initial approval by the Project Manager and Owner, the Project Manager will then formally submit the change request to the Project Sponsor. If the Sponsor approves the scope change the Project Sponsor will then formally accept the change by signing the project change control document. Upon acceptance of the scope change by the Project Sponsor the Project Manager will update all project documents and communicate the scope change to all project team members stakeholders.

SPONSOR ACCEPTANCE

X

Axel Rose
CEO, PJ Enterprises

Addendum

Work Breakdown Structure Table

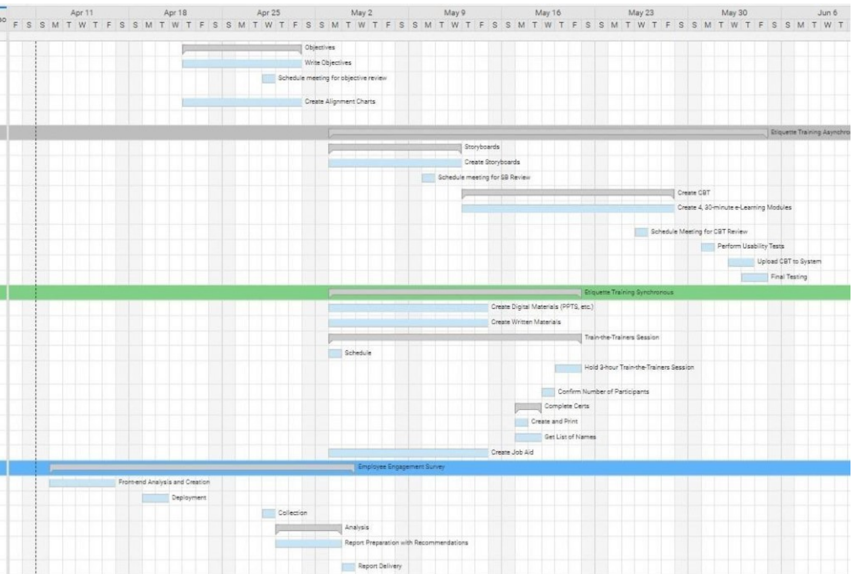
Project	TJP Scale up Solutions & Training	**Project Reference**	TJP PJE 2021
Project Manager:	Pamela S.	**Project Sponsor:**	Axel R.
Prepared by:	Jason A.	**Date / Control Number:**	4.11.2021

Element Number	WBS Elements: Activity, Task, or Sub-Task	Responsible Person or Group
	Etiquette Training – Asynchronous & Synchronous (ETA/S)	
ETA/S-01	Needs assessment	Jason, Tanyika
ETA/S-02	Audience analysis	
ETA/S-03	Context analysis	
ETA/S-04	Goal analysis	Tanyika, Jason, SME
ETA/S-05	Task analysis	
ETA/S-06	Write objectives	Tanyika, Jason
ETA/S-06.1	Schedule meeting for obj. review	Pam
ETA/S-07	Create alignment charts	Tanyika, Jason
ETA/S-08	Write scenarios	Tanyika, Jason, SME
	Etiquette Training Asynchronous	
ETA-01	Create storyboards	Jason
ETA-01.1	Schedule meeting for SB review	Pam
ETA-02	Create 4, 30-minute e-Learning modules	Jason
ETA-02.1	Schedule meeting for CBT review	Pam
ETA-03	Perform usability tests	Jason
ETA-04	Upload to system	
ETA-05	Final test	
	Etiquette Training Synchronous	
ETS-01	Create digital materials (PPTs)	Tanyika
ETS-02	Create written materials	
ETS-03	3-hour train-the-trainers session	Tanyika (and Jason?)
ETS-03.1	Schedule	Tanyika
ETS-03.2	Confirm number of participants	
ETS-03.3	Create & print completion certificates	
ETS-03.3.1	Get list of names	
ETS-04	Create Job Aid	Tanyika and Jason
	Employee Engagement Survey	
EES-01	Create survey	Outsourced
EES-02	Deploy survey	
EES-03	Collect surveys	
EES-04	Analyze surveys	
EES-05	Prepare report with recommendations	
EES-06	Deliver report	Pam
	Project Manager Duties (PMD)	
PMD-01	PM team meetings	Pam
PMD-02	Stakeholder meetings	
PMD-03	Project status updates	
PMD-04	Schedule review sessions (objectives, etc.)	

Project schedule

THE TABLE BELOW REPRESENTS THE PROJECT SCHEDULE FOR THE PJ ENTERPRISES PROJECT.

At Risk	Task Name	Start Date	End Date	Assigned To	Duration	% Complete	Predecesso
	Objectives	22/04/21	30/04/21		7d		
	Write Objectives	22/04/21	30/04/21	Jason	7d		
	Schedule meeting for objective review	28/04/21	28/04/21	Pamela Son	1d		
	Create Alignment Charts	22/04/21	30/04/21	Tanyika	7d		
	Write Scenarios						
	Etiquette Training Asynchronous	**03/05/21**	**04/06/21**		**25d**		
	Storyboards	03/05/21	12/05/21	Jason	8d		
	Create Storyboards	03/05/21	12/05/21	Jason	8d		
	Schedule meeting for SB Review	10/05/21	10/05/21	Pamela Son	1d		
	Create CBT	13/05/21	28/05/21	Jason	12d		
	Create 4, 30-minute e-Learning Modules	13/05/21	28/05/21	Jason	12d		
	Schedule Meeting for CBT Review	26/05/21	26/05/21	Pamela Son	1d		
	Perform Usability Tests	31/05/21	31/05/21	Jason	1d		
	Upload CBT to System	02/06/21	03/06/21	Jason	2d		
	Final Testing	03/06/21	04/06/21	Jason	2d		
	Etiquette Training Synchronous	**03/05/21**	**21/05/21**		**15d**		
	Create Digital Materials (PPTS, etc.)	03/05/21	14/05/21	Tanyika	10d		
	Create Written Materials	03/05/21	14/05/21	Tanyika	10d		
	Train-the-Trainers Session	03/05/21	21/05/21	Tanyika	15d		
	Schedule	03/05/21	03/05/21	Pamela Son	1d		
	Hold 3-hour Train-the-Trainers Session	20/05/21	21/05/21	Tanyika	2d		
	Confirm Number of Participants	19/05/21	19/05/21	Tanyika	1d		
	Complete Certs	17/05/21	18/05/21	Tanyika	2d		
	Create and Print	17/05/21	17/05/21	Tanyika	1d		
	Get List of Names	17/05/21	18/05/21	Tanyika	2d		
	Create Job Aid	03/05/21	14/05/21	Jason	10d		
	Employee Engagement Survey	**12/04/21**	**04/05/21**		**17d**		
	Front-end Analysis and Creation	12/04/21	16/04/21	Pamela Son	5d		
	Deployment	19/04/21	20/04/21	Pamela Son	2d		
	Collection	28/04/21	28/04/21	Pamela Son	1d		
	Analysis	29/04/21	03/05/21	Pamela Son	3d		
	Report Preparation with Recommendations	29/04/21	03/05/21	Pamela Son	3d		
	Report Delivery	04/05/21	04/05/21	Pamela Son	1d		



Communication Matrix

The table below represents the Communication Plan for the PJ Enterprises project.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Internal Kickoff Meeting	Develop a common understanding of the project goals and role of each stakeholder.	• Web conference	Once	• Project Team	Project Manager	• Agenda • Meeting Minutes	• Soft copy archived on project SharePoint site and project website
External Kickoff Meeting	Introduce the project team and the project. Review project objectives and management approach. Set expectations.	• Web conference	Once	• Project Sponsor • Project Team • Stakeholders	Project Manager	• Agenda • Meeting Minutes	• Soft copy archived on project SharePoint site and project website
Project Team Meetings	Review status of the project with the team.	• Web conference • Conference Call	Weekly	• Project Team	Project Manager	• Agenda • Meeting Minutes • Project schedule	• Soft copy archived on project SharePoint site and project website
Technical Design Meetings	Discuss and develop technical design solutions for the project.	• Web conference	As Needed	• SME • Stakeholders	Instructional Designer	• Agenda • Meeting Minutes	• Soft copy archived on project SharePoint site and project website

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Weekly Project Status Meetings	Report on the status of the project to management.	• Web conference • Conference Call	Weekly	• Project Owner	Project Manager	• Agenda • Meeting Minutes • Course updates • Project schedule	• Soft copy archived on project SharePoint site and project website
Project Status Reports	Report the status of the project including activities, progress, costs and issues.	• Email • Web conference	Weekly	• Project Sponsor • Project Team • Stakeholders • Project Owner	Project Manager	• Project Status Report • Project schedule • Objectives Review • Storyboards Review • CBT Review • Job Aid	• Soft copy archived on project SharePoint site and project website
Training Scope	Report on Synchronous Training scope, agenda, and expectations.	• Web conference • Conference Call • Email	Once	• Project Sponsor • Stakeholders • Project Team (Trainers)	Project Manager	• Agenda • Meeting Minutes • Training Agenda	• Soft copy archived on project SharePoint site and project website
Survey Results	Report on results of employee engagement survey.	• Web conference	Once	• Project Sponsor • Stakeholders • Project Team (Vendor)	Project Manager	• Agenda • Meeting • Minutes • Survey results report	• Soft copy archived on SharePoint site and project website

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Project Closure/Wrap Up Meeting with Team	Close project and thank team.	• Web conference • Conference Call Email	Once	• Project Team (Internal) Project Team (External)	Project Manager	• Agenda • Meeting Minutes Personalized email to each team member	• Soft copy archived on project SharePoint site and project website
Project Closure/Wrap Up Meeting with Client	Close project and gather feedback.	• Web conference • Conference Call • Email	Once	• Project Sponsor • Project Owner • Project Team	Project Manager	• Agenda • Meeting Minutes • Summary Presentation • Feedback Survey	• Soft copy archived on project SharePoint site and project website
Major Emergencies	Report on major project emergency impacting time, budget, or scope.	• Web conference • Conference Call Email	As Needed	• Project Sponsor • Project Owner	Project Manager	• Agenda • Meeting Minutes • Change Request	• Soft copy archived on project SharePoint site and project website
Minor Emergencies	Report on minor project emergency	• Web conference • Conference Call • Email	As Needed	• Project Team	Project Manager	• Agenda • Meeting Minutes	• Soft copy archived on project SharePoint site and project web site

Change Request Form

THE FOLLOWING REPRESENTS THE CHANGE REQUEST FORM TO BE USED FOR THE PJ ENTERPRISES PROJECT.

Change Request Form

Project Name		Date	
Project Number		Requestor	
Project Manager		Project Owner	

Describe the Requested Change

Describe the Reason for the Request

Risk Identification/Analysis

Impact Analysis	
Work Products to be Modified	Version Number
1.	
2.	
3.	
Describe the impact of the suggested change to work that is already complete.	

Quality Impact
Additional Quality Assurance or Quality Control Activities
1.
2.
3.
Describe the impact of the change to quality assurance activities and quality control activities.

Schedule Impact			
New Deliverables Description	Effort Hours	Date Required	Impact to Other Delivery Dates
1.			
2.			
3.			
Based on the impact, state the estimated date for implementing the requested change. State the new estimated project completion date.			

Budget Impact			
New Deliverables Description	Lessen or Eliminate Other Expenses? Please describe.	Cost of New Deliverable	Total
1.			
2.			
3.			
Describe the overall impact to budget/cost.			

Decision	
☐ Approved	☐ Rejected
☐ Approved with modifications	☐ Deferred
Justifications	
Additional Comments	

________________________ ________________________
Approver's Printed Name Date

____
Title

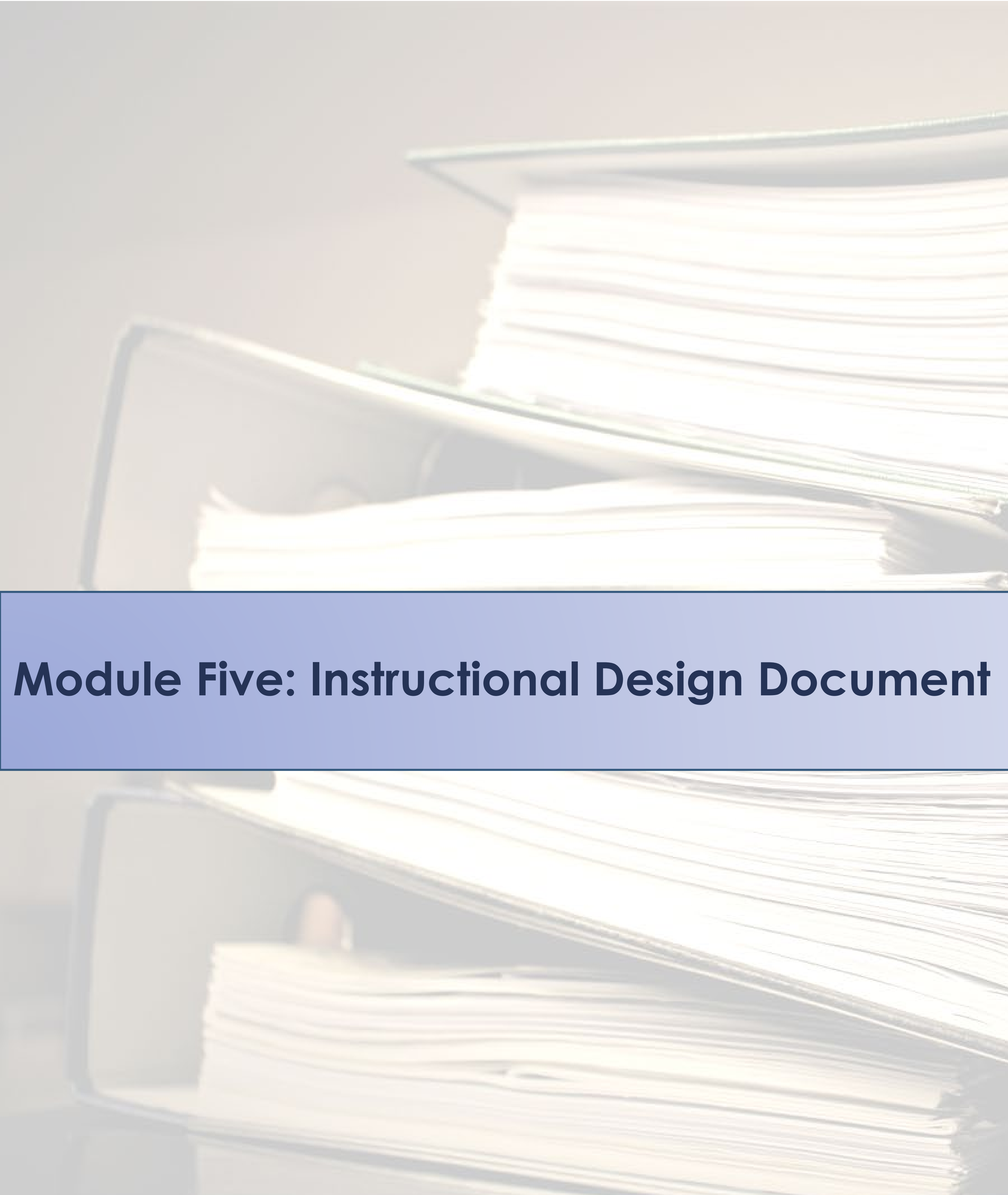
____
Signature

For additional project management templates visit www.mypmllc.com/project-management-resources/free-project-management-templates.

References

Project Scope Management Plan Template, www.ProjectManagementDocs.com

WBS Form, Sourced from EDUC768 Course Template, https://uwsto.instructure.com/courses/361856/files/29575509/download?wrap=1



Module Five: Instructional Design Document

Purpose

PJ Enterprises is a mail-order company that specializes in gifts, apparel, and home accessories. For the upcoming year, PJ Enterprises has four goals including reaching or exceeding their projected sales, customer lists, and profit targets as well as improving customer-service scores, work environment, and staff development opportunities. The company is experiencing several issues in these areas including customer loss because of poor customer service, employee dissatisfaction and high employee turnover, and challenges related to the hiring and training of new employees. TJP Consultants will focus on employee satisfaction and customer service.

Our main solutions will include:

• Shifting to a train the trainer mentality. The Catalogue Director and Merchandising Manager will empower the customer service supervisors to train their respective teams on catalogue items. Customer Service Supervisors will actively communicate with telephone operator on an ongoing basis. This will replace the traditional one-way training provided quarterly. This shift will encourage a learning environment, increase the telephone operator's engagement with training and ultimately their product knowledge.

• Situational Training beyond only catalogue items. One of the issues identified by management, indicate an increase of 30 percent in customer complaints with the telephone operators and improper phone etiquette. The quarterly training will include "what if scenarios" which will allow the telephone operator to refine the quality of their responses.

The computer-based training is to improve the Telephone Operators' customer service skills and product knowledge. Telephone Operators will gain the knowledge, skills, and ability to handle customer service inquiries quickly and successfully in this on-demand course.

The train the trainer course aims to prepare Customer Service Supervisors to deliver training to their respective teams. It will provide participants and subject matter experts with the knowledge and the skills to design and provide practical classroom training.

Target Audience

THE TARGET AUDIENCE IS TELEPHONE OPERATORS AND CUSTOMER SERVICE SUPERVISORS.

General learner characteristics and prerequisite knowledge:

Telephone Operators

- Adults aged 19 – 35.
- At least a High School education.
- Motivated by rewards and incentives.

- Should have basic computer skills, including keyboarding and accessing and navigating the internet.
- Should have general knowledge of customer service and PJ Enterprises' product offerings.

Customer Service Supervisors

- Adults aged 30 – 50.
- College graduates.
- Motivated by rewards and incentives.
- Should have an above average knowledge of customer service.
- Should have detailed knowledge of PJ Enterprises' product offerings.
- Should be familiar with the company's customer service policies and procedures.

Application of learning theory:

Because this course focuses on adults, the application of Knowles' Six Principles of Andragogy and Merrill's First Principles of Instruction is effective for the design. Further, behavior-based learning objectives informed by Robert Mager's ideas will be utilized. As with any instruction, the application of Universal Learning for Design (UDL) principles will add much efficacy to this course.

With reference to Knowles, he says that adults learn better when instruction is relevant and practical. These courses by nature are relevant and practical, which should also increase internal motivation. Knowles also points out that adults have much life and professional experience, which can be leveraged in new learning. This is especially true with the supervisor training as they will know typical product knowledge problems occur. Throughout, supervisors and operators will be prompted to compare aspects of their previous jobs to this one, which has two benefits. First, this will capitalize on the learners' professional experience by inviting them to reflect on how the products and scenarios. Second, marrying new with prior knowledge will increase learning.

Utilizing Merrill, the course will contain engaging, task-centered activities allowing the learners to activate prior knowledge to help them apply and integrate the new knowledge to the workplace.

The application of UDL principles will occur in various ways. The course will be created in Storyline and be self-paced. Additionally, all course text will be organized into a reference document the new instructors can keep and make use of once their courses begin and issues inevitably arise. Also, assessments will be conducted in various ways allowing the learners multiple ways to express what they have learned. Finally, the self-paced course will allow the new instructors freedom not only to approach the course with as much time as they want but also extra time to complete the assessment activities as they need.

Training format

Asynchronous and synchronous training.

Learning Environment

For the **asynchronous** computer-based training, the learning environment should:

- Include a laptop or computer for each participant.
- Include internet access.
- Include access to PJ Enterprises' LMS.
- Be free of connectivity issues.
- Contain sufficient bandwidth to meet demand.
- Be free of distractions.

For the **synchronous** train the trainer session, the learning environment should include:

- Internet access.
- LCD projector or smartboard (or similar presentation device).
- Whiteboard or flipchart with markers.
- Post-it-Notes.
- Pens for each participant.

Learning Objectives

1. Terminal Objective: Operators will be able to conduct a customer service call from beginning to end observing the basics of phone etiquette.

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Operators will be able to start and end a call using proper phrasing.	**Instructional Video** A video that instructs how to start and end a call including examples.	**Scenario-based Questions:** Operators will listen to a series of short starting and ending customer interactions and will choose if the scenario operator used acceptable terms.	
	Assessment – Quiz: Pick-one questions where the person chooses the best phrase for starting and ending a call.	**Assessment - Scenario-based Questions:** Operators will listen to a series of short starting and ending customer interactions and will choose if the scenario operator used acceptable terms.	
Operators will be able to name the four basic features of good phone etiquette - phrasing, tone of voice, speaking clearly, and listening carefully – and explain good and bad examples of each.	**Instructional Videos** A series of four short videos that explain the four basic features of phone etiquette and briefly shows good and bad examples of each.	**Scenario-based Questions:** Operators will listen to a series of short customer service calls where the scenario operator breaks one or more of the etiquette rules. The learner must identify which rule or rules were broken.	
		Assessment - Scenario-based Pick-one/Pick-many Questions: Operators will listen to a series of short customer service calls where the scenario operator breaks one or more of the etiquette rules. The learner must identify which rule or rules were broken.	
Operators will be able to successfully complete an entire customer service call observing the four basic features of phone etiquette.	**Video Demonstration** Video will show three full customer service calls, two very good and one horrible, followed by commentary.	**Scenario-based Questions:** Operators will be able to successfully complete with a score of 90 or higher a series of authentic branching scenarios that simulate actual calls and include choices where the operator must distinguish between good and bad examples of phone etiquette.	
		Assessment – Scenario-based Questions: Operators will be able to successfully complete with a score of 90 or higher a series of authentic branching scenarios that simulate actual calls and include choices	

		where the operator must distinguish between good and bad examples of phone etiquette.

2. Terminal Objective: Supervisors will be able to deliver effective catalogue item training to operators by applying instructional design principles.

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Supervisors will be able to explain cognitive overload and demonstrate with 80% accuracy how to avoid cognitive overload in their training.	PowerPoint lecture on cognitive overload and ways to avoid it.	**Training discussion and group task.** Supervisors will take badly designed product training examples and chunk it to more appropriate lengths.	
	Assessment- Knowledge check on cognitive overload and ways to avoid.	**Assessment:** Supervisors will take badly designed product training examples and chunk it to a more appropriate length.	
Supervisors will be able to articulate the general characteristics of adult learning and motivation and show how they will apply three or more of these ideas to their training.	PowerPoint lecture on adult learning and motivation and ways to apply it to product training.	. **Training discussion and group task.** Supervisors will apply three or more adult learning and motivation principles to their current product training.	
	Assessment: Knowledge check on adult learning and motivation principles.	**Assessment:** Supervisors will apply three or more adult learning and motivation principles to their current product training.	

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Supervisors will be able to explain how to create good scenario-based learning and how they will apply this knowledge to their training.	PowerPoint lecture on scenario-based learning and ways to incorporate it into product training.	**Training discussion and group task.** Supervisors will apply scenario-based learning principles and create a training scenario where operators are confronted with typical, product-related customer issues and must make decisions.	
	Assessment: Knowledge check on scenario-based learning.	**Assessment:** Supervisors will apply scenario-based learning principles and create a training scenario where operators are confronted with typical, product-related customer issues and must make decisions.	

Assessments

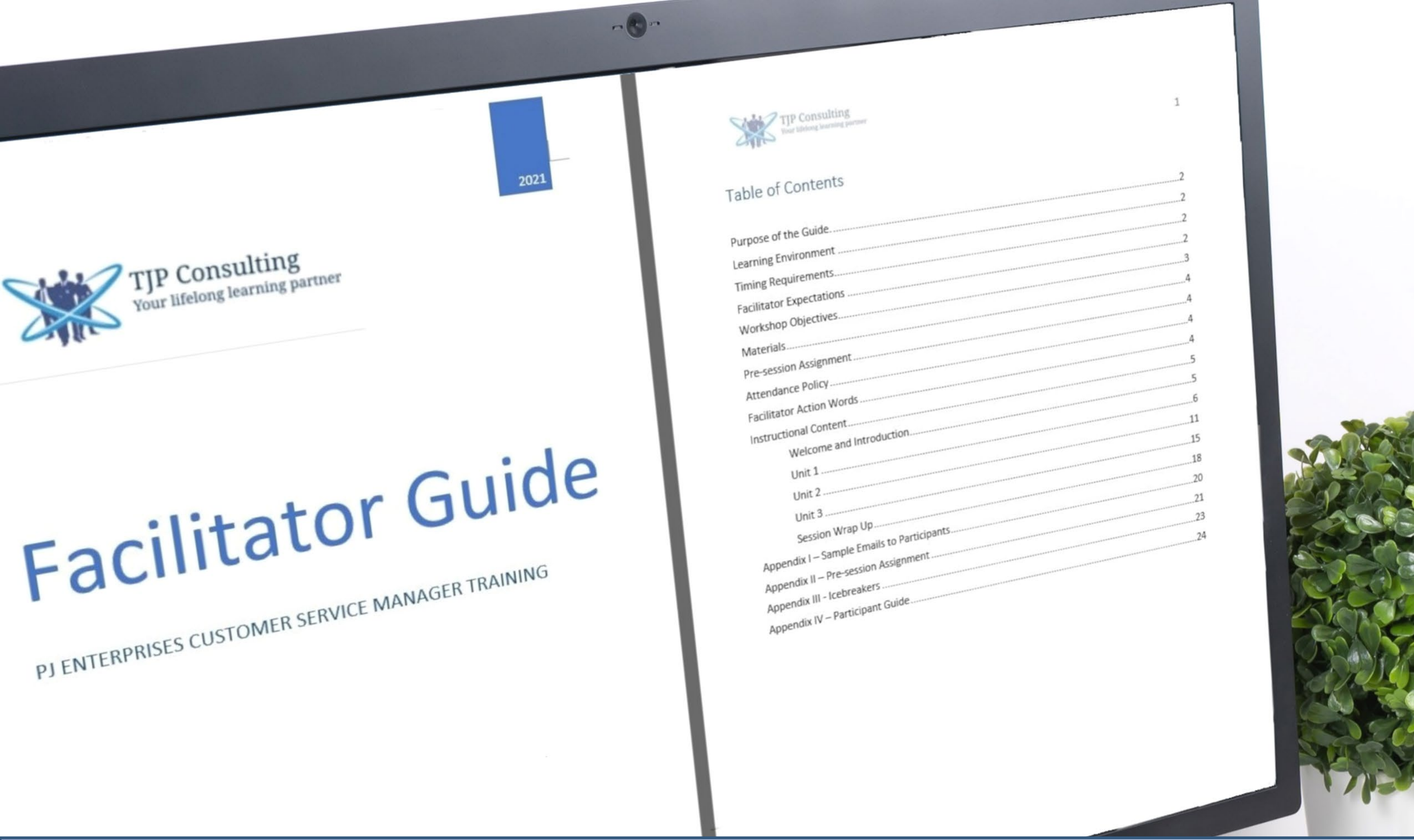
Assessment Summary
Various assessment methods will be used throughout the training program. Our strategy will be to evaluate participants throughout the program, tracking progress and allowing us to make slight changes to content where needed. Participants will have the ability to share feedback, respond to scenario challenges and test their new knowledge. The program's success will ultimately be measured against the original customer service scores provided at the on-set of the project.

Quality Evaluation Plan
Formative With the development of the asynchronous and synchronous training, the instructional designers will consult both with each other and with the Director of HR and supervisors to determine that scenarios are realistic, and the possible responses are authentic. Once the scenarios are developed a series of question will be asked throughout the program to identify what participants found to be most useful and where they still feel they need to develop. The response to scenarios along with the feedback from participants will help to improve the learning experience.
Summative At the end of both the asynchronous and synchronous training sessions, evaluations sheets will be distributed to evaluate the participant learning. A set of multiple-choice questions will be developed and over time cohorts scores will be evaluated for trends in scoring areas.
Confirmative After six months, PJ Enterprises will see if the 10% increase in customer-service scores has been reached. This will be established by taking real-time data and comparing the original customer service scores.

TJP Consulting
Your lifelong learning partner

Scale Up Solutions & Training

Module Six: Facilitator Guide / Storyboard



TJP Facilitator Guide

Purpose of this Facilitator's Guide:

This Facilitator's Guide is designed to assist with the delivery of the face-to-face train the trainer session for PJ Enterprises. The guide contains the information needed to successfully deliver the training, including a pre-session assignment for participants, instructions on what to do before, during, and after training, and suggested facilitation talking points.

This course aims to prepare Customer Service Supervisors to deliver training to their respective teams. It will provide participants and subject matter experts with the knowledge and the skills to design and deliver practical classroom training.

Learning Environment:

The facilitator will conduct training at PJ Enterprises' site. The room should include a strong internet connection (at or above 25 Mbps), a projector and screen or smartboard, whiteboard, and a flipchart. A U-shaped or boardroom-style setup is preferred.

Timing Requirements:

The training will be 3 hours. Each Unit is designed to be delivered in 45 minutes. Below is an example timing breakdown. The specific timing may vary.

Section	**Time**
Session Kickoff and Icebreaker	15 minutes
Unit 1: Cognitive Load	45 minutes
Unit 2: Adult Learning	30 minutes
Break	15 minutes
Unit 2: Adult Learning continued	15 minutes
Unit 3: Scenario-based Learning	45 minutes
Session Wrap Up and Survey	15 minutes

Facilitator Expectations:

To prepare to deliver the training, the facilitator will need to:

Before Training

1. Gather more information about the audience members' needs and priorities and past experiences with the content.
2. Review the Facilitator Guide and PowerPoint slides.
3. Review videos, activities, and reflection questions in the pre-session assignment.

4. Contact PJ Enterprise to confirm participants and obtain participant contact information, including email addresses. The facilitator will ensure PJ Enterprises' IT staff will be onsite for training to provide technical support.
5. Print attendance sheet.
6. Procure sample product training examples from PJ Enterprises or develop some examples for Unit 1 activity.
7. At least ten days before the training event, send out a facilitator introduction and a pre-training assignment included in the guide. **APPENDIX I**
8. Confirm the training location, room set up and equipment, and PJ Enterprises' receipt of digital participant training manuals. PJ Enterprises to provide staff with training materials.
9. Print a personal copy of the Participant Guide for reference. **APPENDIX IV**
10. Send out a reminder to participants two to three days before the training event. **APPENDIX I**
11. In preparation for the training, the facilitator will review each participant's pre-session assignment and quiz results two days before the training.
12. Ask the host to be available on training day to kick off the session.

During Training

1. At the beginning of training, have attendees sign the attendance sheet.
2. Demonstrate expertise in content and broad knowledge of customer service and telephone technology.
3. Support Customer Service Supervisors' understanding of core training and design principles.
4. Use materials to help Customer Service Supervisors make connections between the training they are receiving and the training they will deliver to the Telephone Operators.
5. Assist Customer Service Supervisors with developing a list of best practices for use when delivering training to the Telephone Operators.
6. Model training and facilitation best practices while delivering training.

After Training

1. Provide participants with the end-of-course survey.
2. Distribute digital training certificates to participants who meet the session's attendance policy.

Workshop Objectives:

Supervisors will be able to deliver effective catalogue item training to operators by applying instructional design principles.

- Supervisors will be able to explain cognitive overload and show how to avoid information overload in their training.
- Supervisors will be able to articulate the general characteristics of adult learning and motivation and show how they will apply three or more of these ideas to their training.
- Supervisors will be able to explain how to create effective scenario-based learning and how they will apply this knowledge to their training.

Materials:

The following materials will be needed to deliver this training session. The same materials will be used for all objectives. Product training examples are not required for Unit 3.

- Participants: pens, pads, sticky notes, highlighters, markers, participant manual
- Facilitator: self-adhesive chart paper, markers, facilitator guide, and product training examples
- Technology: Internet access, facilitator laptop, projector and screen, PowerPoint slide presentation, and timer

Pre-Session Assignment:

Participants are expected to complete the pre-session assignment before the training. The pre-session assignment is due to the facilitator no later than two days before the training or otherwise, as indicated by the facilitator. The activities prepare participants to begin thinking about the content, provide them with a foundational knowledge of the concepts to be discussed, and ready them to discuss and practice the concepts at a deeper level. Once the pre-session assignment is completed, participants take a quiz as an assessment and for accountability. The facilitator will review each participant's pre-session assignment and quiz results two days before the training. The pre-session assignment will be incorporated into the instructional content at the beginning of each Unit. **APPENDIX II**

Attendance Policy:

To receive credit for the class, attendees must actively participate and stay for 90% of the session. Attendees must also complete and submit the pre-assignment work to the facilitator by the due date.

Facilitator Action Words:

The guide contains verbs to make the session easier to teach:

PRESENT – to teach material relevant to the session objectives.

SHOW – display a visual or PowerPoint slide.

INSTRUCT – tell participants to do something or provide directions.

ASK – ask questions of the participants and allow them to share their responses.

WRITE - record ideas on a flipchart or whiteboard.

DISCUSS – to facilitate a conversation.

INSTRUCTIONAL CONTENT

Terminal Objective: Supervisors will be able to deliver effective catalogue item training to operators by applying instructional design principles.

Enabling Objective: Supervisors will be able to explain cognitive overload and demonstrate with 80% accuracy how to avoid cognitive overload in their training.

Activities and Methods	Time Estimate
Welcome and Introductions: **Host** • The host kicks off the session by introducing the facilitator and explaining his or her hopes and goals for the training session. The facilitator should share his or her background and experience to build participant confidence.	**(Total Time: 15 minutes)** 5 minutes
Facilitator • Icebreaker Activity to get to know Participants. Choose one of the icebreaker activities below: ***Five Favorites*** ***Would You Rather*** ***The Good and the Bad*** **APPENDIX III**	7 minutes
SHOW Slide Session Expectations	3 minutes

 • **DISCUSS** agenda and session expectations. <u>Session Expectations</u> Participants are invited to engage and participate. <u>WOW Moments and HOW About Ideas</u> Participants should record any "WOW Moments" – something important to them and any "HOW About" ideas. Space is provided in the participant manual. <u>Best Practices</u> During the session, participants will develop a best practice list for use in training the Telephone Operators. After every Unit, they will brainstorm and document practices. The best practices will promote consistency across teams, no matter which Customer Service Manager delivers the training. The best practices are reusable for each of the catalogue rollouts. They should also note the facilitator's training delivery, as the facilitator will model good delivery. • **ASK** for a volunteer to be the recorder. They will record on the flip chart.	**Total Time: 45 minutes**
Unit 1: Cognitive Overload Introduction **SHOW** Slide Unit 1: Lesson Objectives	2 minutes

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PRESENT learning objectives
At the end of this Unit, you will be able to:

Explain cognitive overload.
Show how to avoid cognitive overload in your training.

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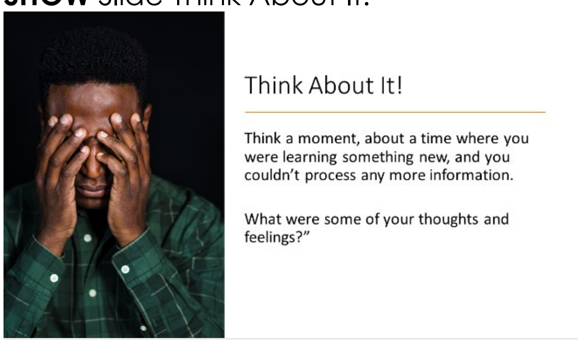
SHOW Slide Think About It!


ASK "Think a moment, about a time where you were learning something new, and you couldn't process any more information. What were some of your thoughts and feelings?"

WRITE their responses on a flipchart.
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<td>2 minutes</td>
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SHOW Slide Cognitive Overload Definition


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<td>3 minutes</td>
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5 minutes

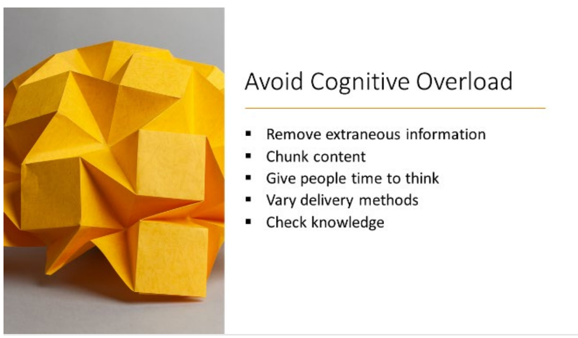
PRESENT "What you were experiencing is cognitive overload. Cognitive overload is when our minds receive more information than it can process."

ASK "What are some ways we can avoid or reduce cognitive overload?"

Facilitator Note: Participants should be familiar with this content. The pre-session assignment covered some ways to avoid cognitive overload.

WRITE their responses on a flipchart.

SHOW Slide Avoid Cognitive Overload



PRESENT "We can avoid cognitive overload using the techniques you just mentioned."

Facilitator Note: Review any of the techniques on the slide not mentioned by the participants.

- Remove extraneous information.
    - Simplify content.
    - Explain key concepts in simple language.
- Chunk content.
    - Break heavy content into smaller specific lessons.
        - Classify and prioritize content
        - Separate content into sections or modules
        - Organize content starting with broad ideas to more complex ideas
        - Do a working memory check. Less is more.
    - It makes the information easier to understand and retain.

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o Will allow learners the memory space to process new information.
• Give people time to think.
o Build-in time to think after an activity or interaction.
• Vary delivery method.
o Mixed delivery methods (visual, auditory, kinesthetic) have a higher chance of maximizing retention.
• Check knowledge.
o Create engaging knowledge checks.
o Allow learners to practice what they have learned.

"Managing cognitive load can help our learners' short term memory move into long term memory and help our training stick."

"When we break our content into bite-sized pieces, our learners don't have to work so hard to retain information. Let's explore the concept of chunking content more deeply."

SHOW the video Chunking: Learning Technique for Better Memory and Understanding (3:32)

After the video

ASK "What questions do you have about chunking content?"

SHOW Slide Activity

INSTRUCT the participants to reference the Unit 1 Activity in their participant manual. Divide them into pairs and distribute two sheets of chart paper, markers, and two training examples to each team. Teams will have 12 minutes
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5 minutes

12 minutes
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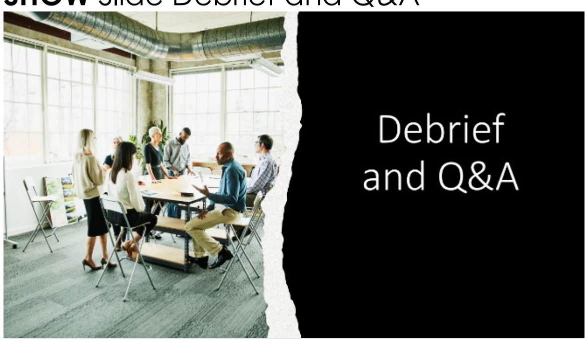
to chunk a poorly designed product training. Explain activity. Activity: Your team is responsible for designing product training. Based on the pre-session material and lesson, take the poorly designed product training examples and chunk them into more appropriate lengths, i.e. determine content hierarchy, and divide modules into smaller related chunks for lessons and topics. During the debrief, report on your decisions. Include any additional decisions you made to avoid or reduce cognitive overload. Materials: Training examples, chart paper, and markers Time: 12 minutes for activity; 8 minutes for debrief **SHOW** Slide Debrief and Q&A  **INSTRUCT** each team to share their decisions with the group. Each team will have 2-3 minutes to present. Facilitator Note: At the end of the work time, let participants know time is up with a positive statement such as, "Let's get together for a discussion." Encourage teams to comment or ask questions about the decisions made by the other team. Assess whether teams can explain cognitive overload and demonstrate with 80% accuracy how to avoid cognitive overload in their training. **SHOW** Slide Brainstorm Best Practices	8 minutes 5 minutes **End Time: 60 minutes**

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INSTRUCT participants to brainstorm cognitive overload and training delivery best practices. The recorder selected at the beginning of the session will write the group's ideas on a flipchart.
Materials: chart paper and marker

Facilitator Note: Close the Unit with a brainstorming activity. Remind participants they will do this to close out each Unit.
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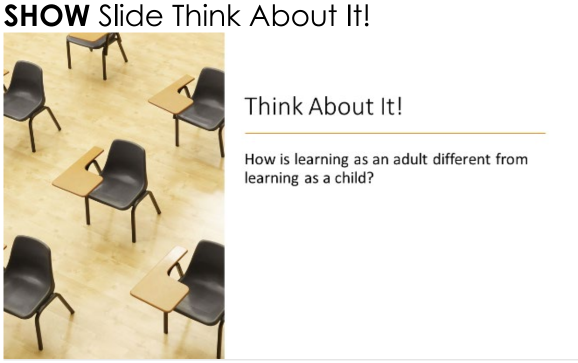
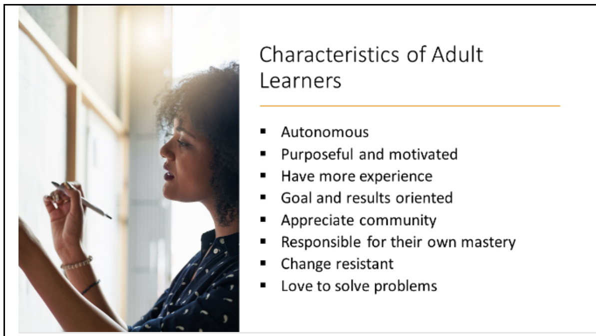
Enabling Objective: Supervisors will be able to articulate the general characteristics of adult learning and motivation and show how they will apply three or more of these ideas to their training.

Activities and Methods	Time Estimate
Unit 2: Adult Learning Facilitator Note: Take a **15-minute Break** in this Unit at about 90 minutes into the 3-hour session or wherever it feels appropriate. **Introduction** **SHOW** Slide Unit: Lesson Objectives	**Total Unit Time: 60 minutes 45 minutes of instruction + 15-minute break** 2 minutes

 **PRESENT** learning objectives At the end of this Unit, you will be able to: • Articulate the general characteristics of adult learning and motivation. • Show how you will apply three or more of these ideas in your trainings.	5 minutes
SHOW Slide Think About It!  **ASK** "How is learning as an adult different from learning as a child?" **WRITE** their ideas on a flipchart. **SHOW** Slide Characteristics of Adult Learners	8 minutes



PRESENT "Adults approach learning differently than young learners. Adults are self-directed. They do not come to learning events as blank slates. They bring background knowledge and thus can take more away. They also require learning to make sense. They want to know what's in it for them."

Facilitator Note: Participants should be familiar with this content. The pre-session assignment covered the characteristics and motivations of adult learners. Briefly review if needed.

- Autonomous.
  - They are typically not dependent on others for direction.
  - Need to feel self-directed.
- Purposeful and motivated.
  - Seeks applicable education.
- Have more experience.
  - Have years of experience and a wealth of knowledge.
- Goal and results-oriented.
  - They often have a problem-centered approach to learning.
- Appreciate community.
  - Have established values, beliefs, and opinions.
- Responsible for their mastery.
  - They expect to be treated as adults.
- Change resistant.
  - Can be skeptical of new information.
  - Prefer to try it out first.

DISCUSS how these characteristics relate to them personally and the members of their teams.

15 minutes

ASK "What questions do you have about the characteristics of adult learners?" **SHOW** Slide Activity  **INSTRUCT** the participants to reference the Unit 2 Activity in their participant manual. The participant should work in the same groups from the previous activity. Distribute two sheets of chart paper and markers to each group. Participants should use the training examples of the last activity. Teams will have 15 minutes to develop a pitch for a new product training. Explain activity. Activity: You have been invited to Shark Tank to pitch your new product training. Use one of the product training examples you chunked in the previous activity. To impress the "sharks," you need to apply three or more adult learning and motivational principles to your design. Your team will have 2 – 3 minutes to present your ideas. In your presentation, describe your "learners" and what motivates them. Materials: Training examples, chart paper, and markers Time: 15 minutes for activity; 10 minutes for debrief SHOW Slide Time to Take a Break	**Total Time: 15 minutes** 10 minutes

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SHOW Slide Debrief and Q&A

INSTRUCT each team to pitch their product training to the group. Each team will have 2 – 3 minutes to present.

Facilitator Note: At the end of the work time, let participants know time is up with a positive statement such as, "Let's get together for a discussion." Encourage teams to comment or ask questions about the presentation made by the other team. Assess whether teams can articulate adult learners' general characteristics and motivation and apply three or more examples in their product training pitch.

SHOW Slide Brainstorm Best Practices
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5 minutes

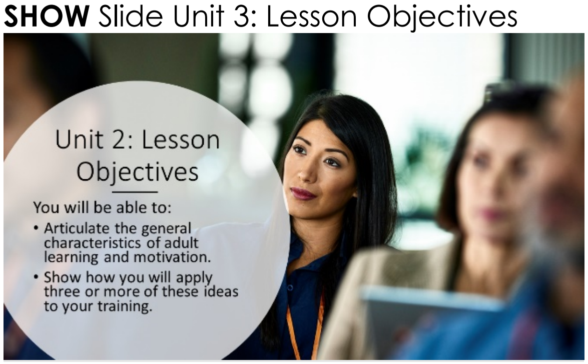
End Time: 2 hours
</td>
</tr>
</table>

<table>
<tr><td>


INSTRUCT participants to brainstorm cognitive overload and training delivery best practices. The recorder selected at the beginning of the session will write the group's ideas on a flipchart.
Materials: chart paper and marker
</td><td></td></tr>
</table>

Enabling Objective: Supervisors will be able to explain how to create effective scenario-based learning and how they will apply this knowledge to their training.

<table>
<tr><th>Activities and Methods</th><th>Time Estimate</th></tr>
<tr><td>
Unit 3: Scenario-based Learning

Introduction
SHOW Slide Unit 3: Lesson Objectives


PRESENT learning objectives
At the end of this Unit, you will be able to:

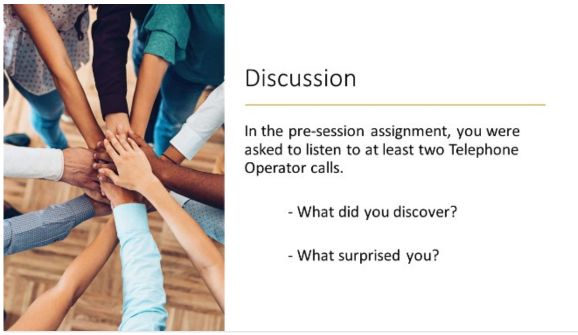
Explain how to create good scenario-based learning.
Explain how you will apply scenario-based learning to your training.

</td><td>
Total Unit Time: 45 minutes

2 minutes
</td></tr>
</table>

8 minutes

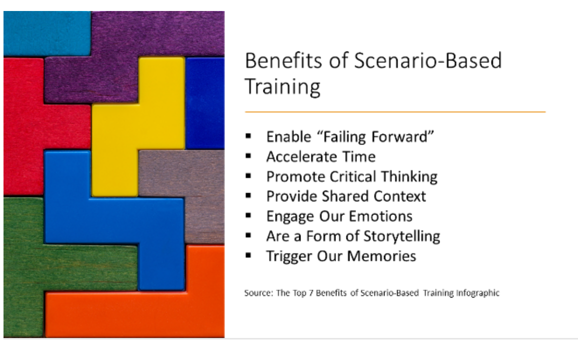
SHOW Slide Discussion



DISCUSS the pre-session assignment. "In the pre-session assignment, you were asked to listen to at least two Telephone Operator calls. What did you discover? What surprised you?"

5 minutes

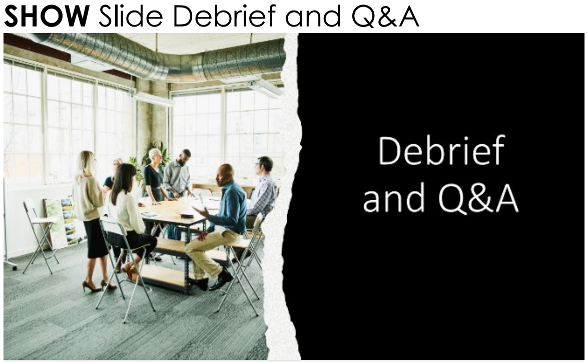
SHOW Slide Benefits of Scenario-Based Training

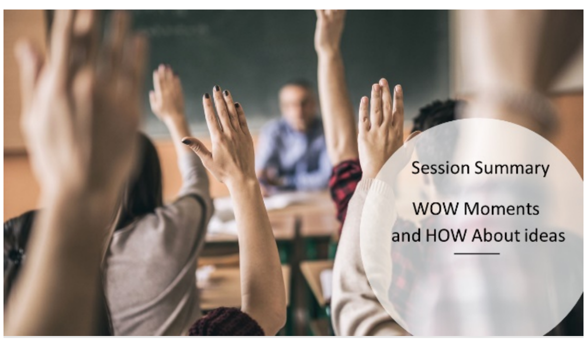


PRESENT "Scenario-based training is a popular training approach. It puts learners in real-life situations and gives them the freedom to make mistakes in a safe environment. Learning experts such as Ruth Clark suggest that problem-based learning is better for long-term retention."

- Enable "Failing Forward"
    - Provide learners with a safe place to make and fix mistakes.
- Accelerate Time

- Learners can make decisions, implement them, and experience the consequences within the same activity. • Promote Critical Thinking - Learners make decisions and think through problems. • Provide Shared Context - Provides an opportunity to bond and form relationships. • Engage Our Emotions - They trigger long and short-term memory. • Are a Form of Storytelling - When stories are relatable, it improves retention. • Trigger Our Memories - Authentic experiences create linkages in the brain. Facilitator Note: Participants should be familiar with this content. The pre-session assignment covered developing scenarios and the benefits they provide to learners. Briefly review if needed. **ASK** "What questions do you have about scenario-based learning?" **SHOW** Slide Activity  **INSTRUCT** the participants to reference the Unit 3 Activity in their participant manual. Participants should work in the	15 minutes

same groups from the previous activity. Distribute one sheet of chart paper and markers to each group. Explain activity. Activity: Using the scenario-based learning principles discussed, your team will create a training scenario where operators are confronted with typical product-related customers. The scenario can yield either positive or negative results. During the debrief, your team will role-play the scenario. Then, share the learning outcomes your team hopes to achieve. Team presentations, including role-play, should be no more than 3-4 minutes. Materials: Chart paper and markers Time: 15 minutes for activity; 10 minutes for debrief	10 minutes
SHOW Slide Debrief and Q&A  **INSTRUCT** each team to role-play their scenario and share their anticipated learning outcomes with the group. Role-play and presentations should be no more than 3-4 minutes. Facilitator Note: At the end of the work time, let participants know time is up with a positive statement such as, "Let's get together for a discussion." Encourage teams to comment or ask questions about the role-play and the anticipated learning outcomes. Assess whether teams can create effective scenario-based learning that they can apply to their training. The scenarios should be authentic and allow the telephone operators to apply what they learn with confidence.	5 minutes

SHOW Slide Brainstorm Best Practices  **INSTRUCT** participants to brainstorm cognitive overload and training delivery best practices. The recorder will write the group's ideas on a flipchart. Materials: chart paper and marker **Session Wrap Up** **SHOW** Slide Session Summary  **PRESENT** "In our training session, we spent time reviewing the importance of designing training that takes into consideration cognitive load. We do not want to give our learners more than they can consume. We also discussed the characteristic of adult learners and what motivates them to learn. And finally, we talked about scenario-based learning, creating authentic situations for our learners to learn from and fix their mistakes in a safe environment."	**Total Time: 15 minutes** 10 minutes 5 minutes

ASK participants to share any WOW Moments and HOW About Ideas they captured during the training. **SHOW** Slide Session Wrap Up  **PRESENT** "I want to thank your participation. Your willingness to engage, question, and join in on the discussion contributed to a great training experience. I want to present you each with a training completion certificate for a job well done. Your feedback is also a valuable part of our training. Please complete the end-of-session survey. **DISTRIBUTE THE CERTIFICATES AND THE END OF SESSION SURVEY.** **COLLECT THE SURVEY RESULTS.**	**END TIME: 3 HOURS**

APPENDIX I

SAMPLE EMAIL TO TRAINING PARTICIPANTS

Dear [Participant],

My name is [Facilitator Name], and I am excited to conduct the [Training Name] on [Training Date] at [Training Location].

In preparation for your training, please complete the pre-session assignment below. It should take approximately 2 hours. Once finished, please take the **[Pre-session Quiz]**. Email your answers to the reflection questions to **[email address]** by **[due date].**

To make the most of our time together, please come to the session prepared to discuss the videos you watched and share your answers to the reflection questions. Your advanced preparation is vital to our having a successful training session.

PRE-SESSION ASSIGNMENT GRID GOES HERE

SAMPLE REMINDER EMAIL TO PARTICIPANTS

Dear [Participant],

Your training session, **[Training Name]**, is in **[#]** short days on **[Training Date]**. I cannot wait to assist you and your colleagues in gaining the skills and knowledge to design and deliver training to your teams. You are expected to have completed the pre-session assignment before the training session. It will take approximately 2 hours. Please see the pre-session assignment below. Once finished, please take the **[Pre-session Quiz].** Email your answers to the reflection questions to **[email address]** by **[due date].**

To make the most of our time together, please come to the session prepared to discuss the videos you watched and share your answers to the reflection questions. Your advanced preparation is vital to our having a successful training session.

PRE-SESSION ASSIGNMENT GRID GOES HERE

APPENDIX II

Pre-Session Assignment

Approximate Time to Complete: 2 hours

Content/Unit	Assignments
Introduction	ANSWER: Recall a time where you were in a formal learning environment as an adult. The learning environment could be a class, college, work, or volunteer training session. Consider the instructor, the training materials, your engagement level, and the relevancy of the training content. List some things that were positive about the experience. Recall a negative adult learning experience. List some things that were negative about the experience. Compare and contrast the two. Total Time: 15 minutes
Unit 1: Cognitive Overload	Watch Video: How Does Memory Work? (3:48) Watch Video: What is Cognitive Overload (2:22) Watch Video: Cognitive Load Theory How Do I Apply It (4:20) Watch Video: Lecturing for Learning: Cognitive Load (3:16) Watch Video: Byte sized Canvas – Uh, Oh…Your Cognitive Overload is Showing (4:50) Read Article: How to Avoid Cognitive Overload during Learning (3 minutes) ANSWER: How can memory impact learning? ANSWER: List some ways to reduce or avoid cognitive overload. Total Time: 30 Minutes
Unit 2: Adult Learning	Read Article: 8 Characteristics of Adult Learners Every L&D Pro Should Know (5 minutes) Watch Video: 6 Tips for Adult Learning (2:39) ANSWER: List and explain the six tips presented in the video. Which of the tips motivate you as a learner? Total Time: 15 minutes
Unit 3: Scenario-based Learning	Watch Video: When to Use Scenarios, Simulations, & Interactive Stories (25:22)

	ANSWER: Listen to at least two telephone operator calls. Was the Telephone Operator able to, quickly and successfully, handle the customer's inquiry? If not, was the call forwarded to a supervisor for resolution? Why was the call forwarded? What could the telephone operator have done differently? ANSWER: Describe the perfect customer service call. Total Time: 45 minutes
Complete the Quiz	**[Quiz Link]** 15 Minutes
	TOTAL TIME: APPROXIMATELY 2 HOURS

APPENDIX III

Icebreakers

Five Favorites
Time: 5 – 10 minutes depending on group size

Materials: Pen and paper

Instructions: Ask the participants to write down five of their favorite things related to the topic. For example, they could write five of their favorite ideas from the pre-session assignment.

Would You Rather
Time: 5 – 10 minutes depending on group size

Materials: N/A

Instructions: Ask the participants a fun or topic-related question and have them select between the two options. For example, would you rather have a horrible long-term memory or short-term memory?

The Good and the Bad
Time: 5 – 10 minutes depending on group size

Material: N/A

Instructions: Divide the participants into pairs. If the group size is too small, this can be done individually. Have the pairs/individuals come up with a bad learning or customer service experience. Next, ask the other teams or individuals to find the good in the bad.

APPENDIX IV
Participant Guide

2021

TJP Consulting
Your lifelong learning partner

Participant Guide

PJ ENTERPRISES CUSTOMER SERVICE MANAGER TRAINING

Instructors Guide Table of Contents

PJ Enterprises Participant Guide

Course Outline

Section	Time
Session Kickoff and Icebreaker	15 minutes
Unit 1: Cognitive Load	45 minutes
Unit 2: Adult Learning	30 minutes
Break	15 minutes
Unit 2: Adult Learning continued	15 minutes
Unit 3: Scenario-based Learning	45 minutes
Session Wrap Up and Survey	15 minutes
Total TIme	3 Hours

Training Goals and Objectives

Supervisors will be able to deliver effective catalog item training to operators by applying instructional design principles.

- Supervisors will be able to explain cognitive overload and demonstrate with 80% accuracy how to avoid cognitive overload in their training.
- Supervisors will be able to articulate the general characteristics of adult learning and motivation and show how they will apply three or more of these ideas to their training.
- Supervisors will be able to explain how to create effective scenario-based learning and how they will apply this knowledge to their training.

Organization of the Guide

Pre-session Assignment Reminder	This section of your participant guide will remind you of activities from the pre-session assignment.
Learning Objectives	The Learning Objectives detail what you should be able to do as a result of the training.
Note-taking	Use this section of your participant manual to take notes.
Activity	Look for opportunities to participate in Think About It, Answer It or Practice It activities.
Debrief and Q & A	At the end of a group activity, there will be time for discussion, reflection, and asking questions.
Wow Moments and How About Ideas	In this section of your participant manual, record any "WOW Moments" – something important to you and any "HOW About" ideas.
Best Practices	In this section of your participant manual, write down best practices. Make a connection between what you are learning and what you implement in your training.

Pre-session Assignme.	Recall a time where you were in a formal learning environment as an adult. The learning environment could be a class, college, work, or volunteer training session. Consider the instructor, the training materials, your engagement level, and the relevancy of the training content. List some things that were positive about the experience. Recall a negative adult learning experience. List some things that were negative about the experience. Compare and contrast the two.

Introduction

	UNIT 1 At the end of this Unit, you will be able to: • Explain cognitive overload. • Show how to avoid cognitive overload in your training.
Pre-session Assignme .	Watch Video: How Does Memory Work? (3:48) Watch Video: What is Cognitive Overload (2:22) Watch Video: Cognitive Load Theory How Do I Apply It (4:20) Watch Video: Lecturing for Learning: Cognitive Load (3:16) Watch Video: Byte sized Canvas – Uh, Oh…Your Cognitive Overload is Showing (4:50) Read Article: How to Avoid Cognitive Overload during Learning (3 minutes) ANSWER: How can memory impact learning? ANSWER: List some ways to reduce or avoid cognitive overload.

Think About It!

Think a moment, about a time where you were learning something new, and you couldn't process any more information. What were some of your thoughts and feelings

Answer It!

"What are some ways we can avoid or reduce cognitive overload?"

Avoid Cognitive Overload

- Remove extraneous information
- Chunk content
- Give people time to think
- Vary delivery methods
- Check knowledge

Practice It!

Your team is responsible for designing product training. Based on the pre-session material and lesson, take the poorly designed product training examples and chunk them into more appropriate lengths, i.e., determine content hierarchy, and divide modules into smaller related chunks for lessons and topics. During the debrief, report on your decisions. Include any additional decisions you made to avoid or reduce cognitive overload.

Debrief and Q & A

Wow Moments and How About Ideas	List any "Wow Moments" and "How About Ideas."

1.
2.
3.
4.
5.

Best Practices	Collaborate with your colleagues and write down any best practices you will incorporate in your training.

1.
2.
3.
4.
5.

References

The contents of this facilitator guide were developed using many learning and instructional sources. They are detailed below.

INSTRUCTIONAL DESIGN

Accelerating Expertise With Scenario-Based Learning. (2021, February 19). Main. https://www.td.org/magazines/td-magazine/accelerating-expertise-with-scenario-based-learning

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Mager, R. F. (1997). *Making Instruction Work: Or Skillbloomers: A Step-By-Step Guide to Designing and Developing Instruction That Works* (2nd ed.). Center for Effective Performance.

Malamed, C. (2012, July 24). *Chunking Information for Instructional Design*. The ELearning Coach. https://theelearningcoach.com/elearning_design/chunking-information/

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eLearning Infographics. (2015, March 17). *Top 7 Benefits of Scenario-Based Training Infographic*. https://elearninginfographics.com/top-7-benefits-scenario-based-training-infographic/

Sethi, J. (2019, November 21). *Using Pre Work To Improve Training Effectiveness*. Human Resources Blog | Top HR Blog. https://www.humanresourcesblog.in/2015/08/26/using-pre-work-to-improve-training-effectiveness/#:%7E:text=Structured%20pre%20work%20can%20rescue,of%20the%20training%20process%20intact.

Stolovitch, H. (2002). *Telling Ain't Training* (1st ed.). ASTD.

Wilson, F. (2020, December 31). *14 Best Icebreakers for Meetings & Training Seminars (New Guide)*. NTask. https://www.ntaskmanager.com/blog/5-best-icebreakers-for-meetings-training-seminars/

TJP Consulting

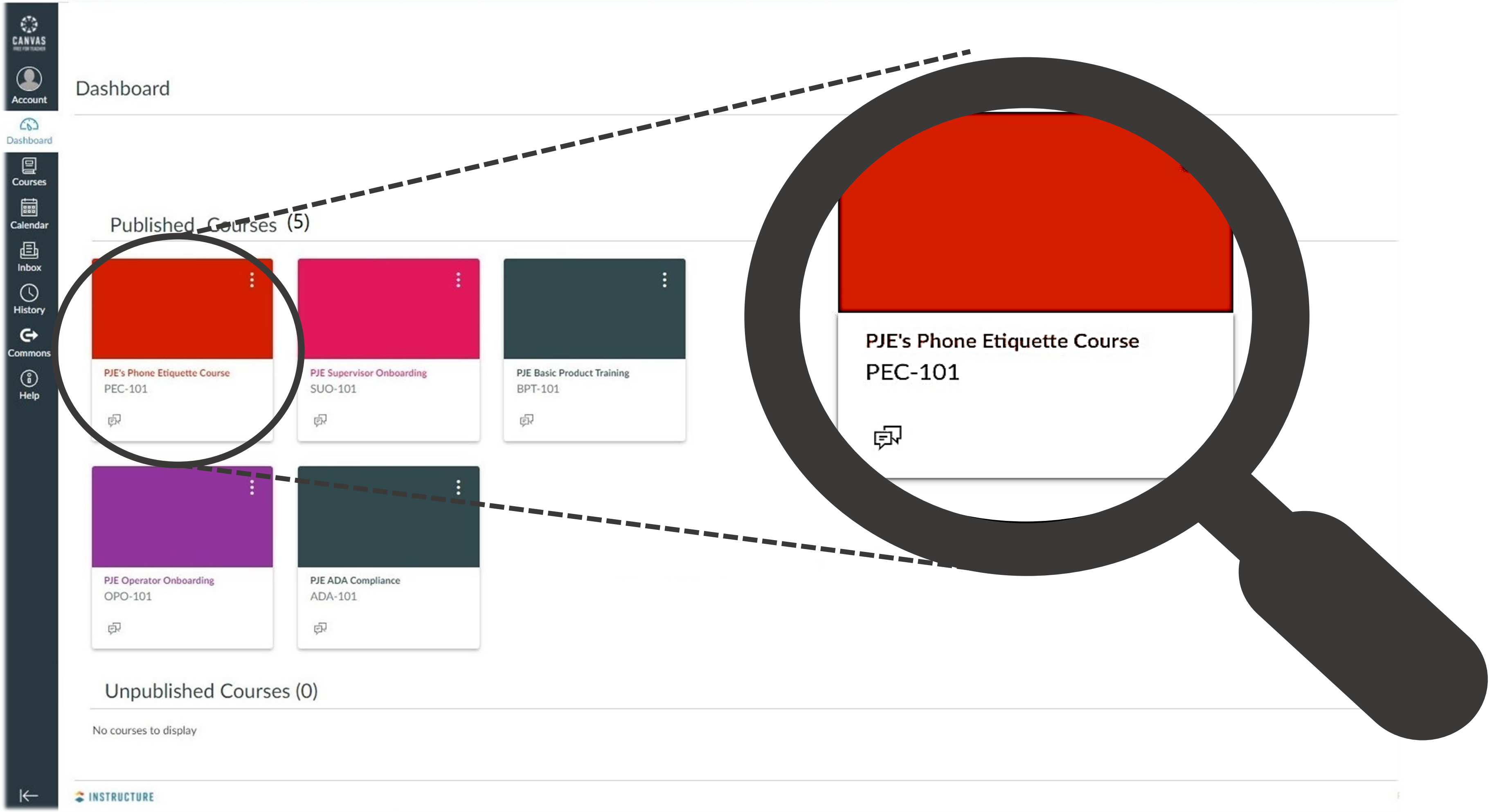
TJP STORYBOARD

PJ Enterprises

Learner Access to Course

TJP Consulting
Your lifelong learning partner

Learners will access the course through the company's LMS. The completion of modules and scores from assessments will be recorded.



Course Name	CBT Etiquette Training – PJE	Screen ID	Welcome	Screen #	1	Date	5.2.2021

Programming Notes

- No animation.
- Navigation Note: All slides will be named specifically, and if the navigation button shares the name of the slide, no further notes will be found in these sections. If the button name differs from the slide name, a note can be found in this area of the SB.
- Begin button goes to About the Course slide.
- Be sure next and back buttons go or return to the appropriate slide in the series.

Graphics Information

- Image of a telephone operator with a headset.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark: #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)

Audio Information/Description

- None

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	About This Course	Screen #	2	Date	5.2.2021

PJ Enterprises

About This Course

This course will help you transition and excel in your new position at PJ Enterprises.

This training is divided into **four modules** and should take roughly **two hours** to complete.

By the end, you will be able to:
- communicate with customers effectively.
- use proper language during customer calls.
- minimize phone distractions.
- handle angry or rude customers.

Click to Listen

Continue to Main Menu

Credits

Programming, Animation Notes

- Title: wipe left at start for 1 sec.
- Rest will fade in over .75 sec.
- Credits button opens the credit screen as a layer. The credits screen will also appear at the end of the course on the Course Complete slide.

Graphics Information

- Person at a computer taking this training.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark: #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)

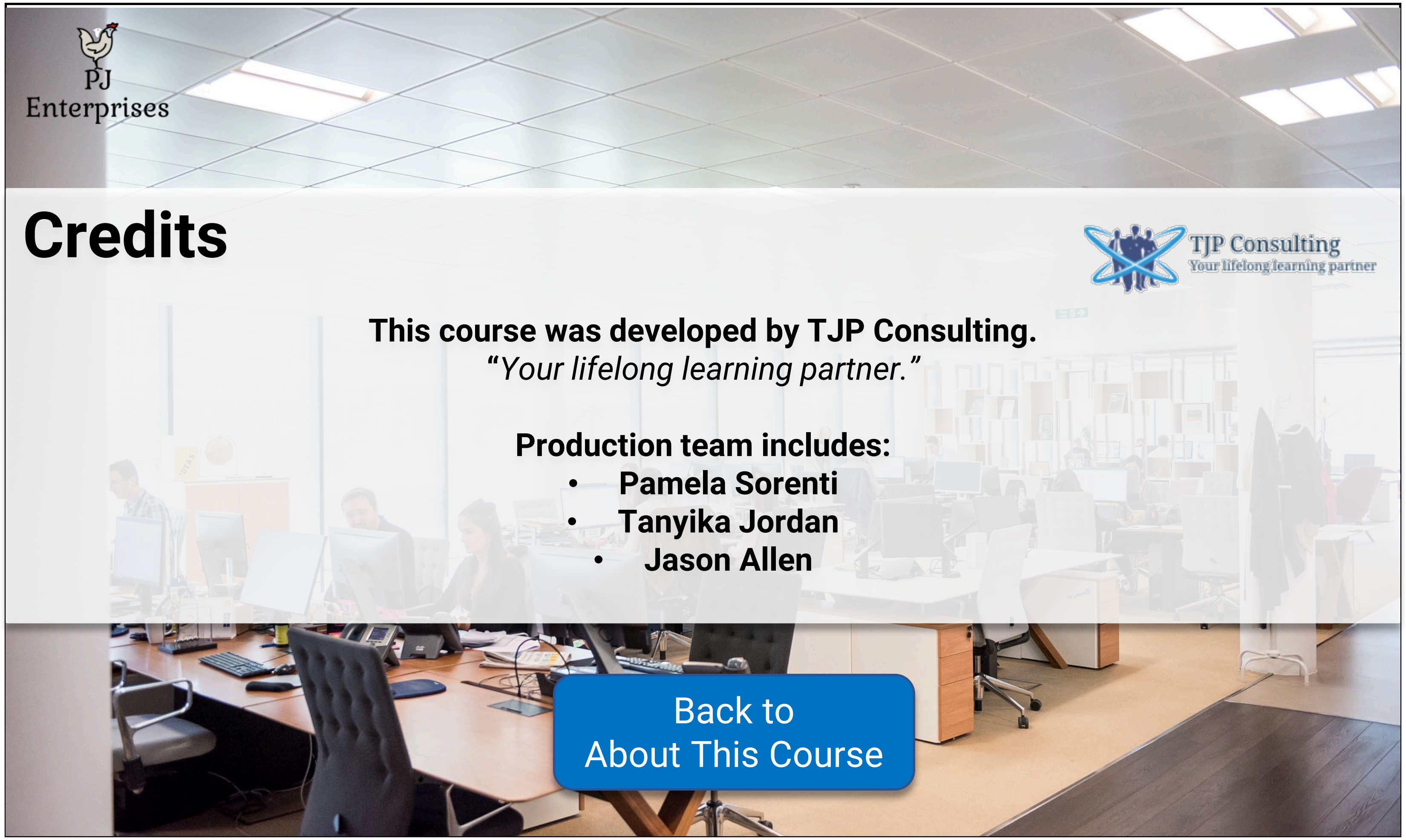
Audio Narration

- Learners can click the "Listen" button for a narration of this information.
  - *Welcome to PJ Enterprises' Phone Etiquette Training. This course will help you transition and excel in your new position at PJ Enterprises. This training is divided into four modules and should take roughly two hours to complete. By the end of this course, you will be able to communicate with customers effectively, use proper language during customer call, minimize phone distractions, and handle angry and rude customers effectively. Continue to the Main Menu when you're ready.*

Questions, Comments, Misc. Notes

- Note: allowing both text and audio as well as providing all narration transcripts in the resources section follows Universal Design for Learning principles.

Course Name	CBT Etiquette Training – PJE	Screen ID	Credits	Screen #	2.1	Date	5.2.2021



Programming, Animation Notes

- No animation.
- This is a layer of both the About This Course slide and the Goodbye slide.

Graphics Information

- A photo of people working on computers.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark: #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Main Menu	Screen #	3.0	Date	5.2.2021

PJ Enterprises

PJE Phone Etiquette Training Main Menu

Module 1:
Phone Etiquette Basics

Module 2:
Proper Phone Language

Module 3:
Minimizing Phone Distractions

Module 4:
Handling Rude or Angry Callers

Return to Main Menu

Complete all four modules to finish the course.

Finish

Programming, Animation Notes

- No animation.
- Set up a Boolean variable (mod1Complete; mod2Complete, etc.) that enables the next module when the learner enters the completion slide for that module. All four complete will activate the finish button.
  - Also with the same variables, make the checkmarks on the menu and submenus appear when they finish that section.

Graphics Information

- Person at a computer.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark: #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/ Description

- None for this slide

Questions, Comments, Misc. Notes

- Note: The main menu is doubling as the table of contents.
- Note: Learners must progress linearly.
- This is the main menu at the start of the course.
- The Home icon returns the user to the main menu. The course map informs the user where they are in the training and allows for navigation. The Resources icon gives users access to the transcript for the course, a glossary of proper expressions, and more!

Course Name	CBT Etiquette Training – PJE	Screen ID	Main Menu	Screen #	3.4	Date	5.2.2021

PJ Enterprises

PJE Phone Etiquette Training Main Menu

Module 1:
Phone Etiquette Basics

Module 2:
Proper Phone Language

Module 3:
Minimizing Phone Distractions

Module 4:
Handling Rude or Angry Callers

Course Map

Complete all four modules to finish the course.

Finish

Programming, Animation Notes

- No animation.
- Set up a Boolean variable (mod1Complete; mod2Complete, etc.) that enables the next module when the learner enters the completion slide for that module. All four complete will activate the finish button.
    - Also with the same variables, make the checkmarks on the menu and submenus appear when they finish that section.

Graphics Information

- Person at a computer.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
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    - White
    - Light blue: #00B0F0
- PJE Colors
    - Dark blue: #0070C0
    - Light blue: #00B0F0
    - Purple: #645773
    - Dark Purple: #002060
    - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
    - On hover, a pop-up that states:
        - Return to Main Menu
        - Course Map
        - Resources

Audio Information/Description

- None for this slide

Questions, Comments, Misc. Notes

- Note: The main menu is doubling as the table of contents.
- Note: The main menu after all modules are complete and the "Finish" button is revealed.

Course Name	CBT Etiquette Training – PJE	Screen ID	Course Map	Screen #	3.1	Date	5.2.2021

PJ Enterprises

Course Map

Click to jump to that module or submodule.

You are here

Module 1: Phone Etiquette Basics

- Module 1, Section 1 Starting & Ending Calls
- Module 1, Section 2 Phrasing & Tone of Voice
- Module 1, Section 3 Speaking Clearly; Listening Carefully
- Module 1, Section 4 Full Call Scenarios

Module 2: Proper Phone Language

Module 3: Minimizing Phone Distractions

Module 4: Handling Rude or Angry Callers

Back

Programming, Animation Notes

- No animation.
- The modules in the Course Map will unlock as the learner progresses just like in the main menu. Use the same variable (mod1Complete, mod2Complete, etc.) as the main menu one but add for the subsections, too. mod1.1Complete, mod2.3Complete, etc.)
- Any of these buttons, once activated will take the user to that section. (Button names and slide labels will match.)

Graphics Information

- Operator-y picture where the circle is.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark: #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
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- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- None for this slide

Questions, Comments, Misc. Notes

- Course map at the beginning of the course while the user is in the module 1 main menu
- Note: if the user is on the main menu or on the finish screen, remove the “You are here” arrow.

Course Name	CBT Etiquette Training – PJE	Screen ID	Course Map	Screen #	3.3	Date	5.2.2021

PJ Enterprises

Course Map

Click to jump to that module or submodule.

Module 1: Phone Etiquette Basics	Module 2: Proper Phone Language	Module 3: Minimizing Phone Distractions	Module 4: Handling Rude or Angry Callers
Module 1, Section 1 Starting & Ending Calls	Module 1, Section 1 Starting & Ending Calls	Module 1, Section 1 Starting & Ending Calls	Module 1, Section 1 Starting & Ending Calls
Module 1, Section 2 Phrasing & Tone of Voice	Module 1, Section 2 Phrasing & Tone of Voice	Module 1, Section 2 Phrasing & Tone of Voice	Module 1, Section 2 Phrasing & Tone of Voice
Module 1, Section 3 Speaking Clearly; Listening Carefully	Module 1, Section 3 Speaking Clearly; Listening Carefully	Module 1, Section 3 Speaking Clearly; Listening Carefully	Module 1, Section 3 Speaking Clearly; Listening Carefully
Module 1, Section 4 Full Call Scenarios	Module 1, Section 4 Full Call Scenarios	Module 1, Section 4 Full Call Scenarios	Module 1, Section 4 Full Call Scenarios

You are here

Back

Programming, Animation Notes

- No animation.
- The modules in the Course Map will unlock as the learner progresses just like in the main menu. Use the same variable as the main menu one.
- Any of these buttons, once activated will take the user to that section. (Button names and slide labels will match.)

Graphics Information

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- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark: #404040
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  - Light blue: #00B0F0
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- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

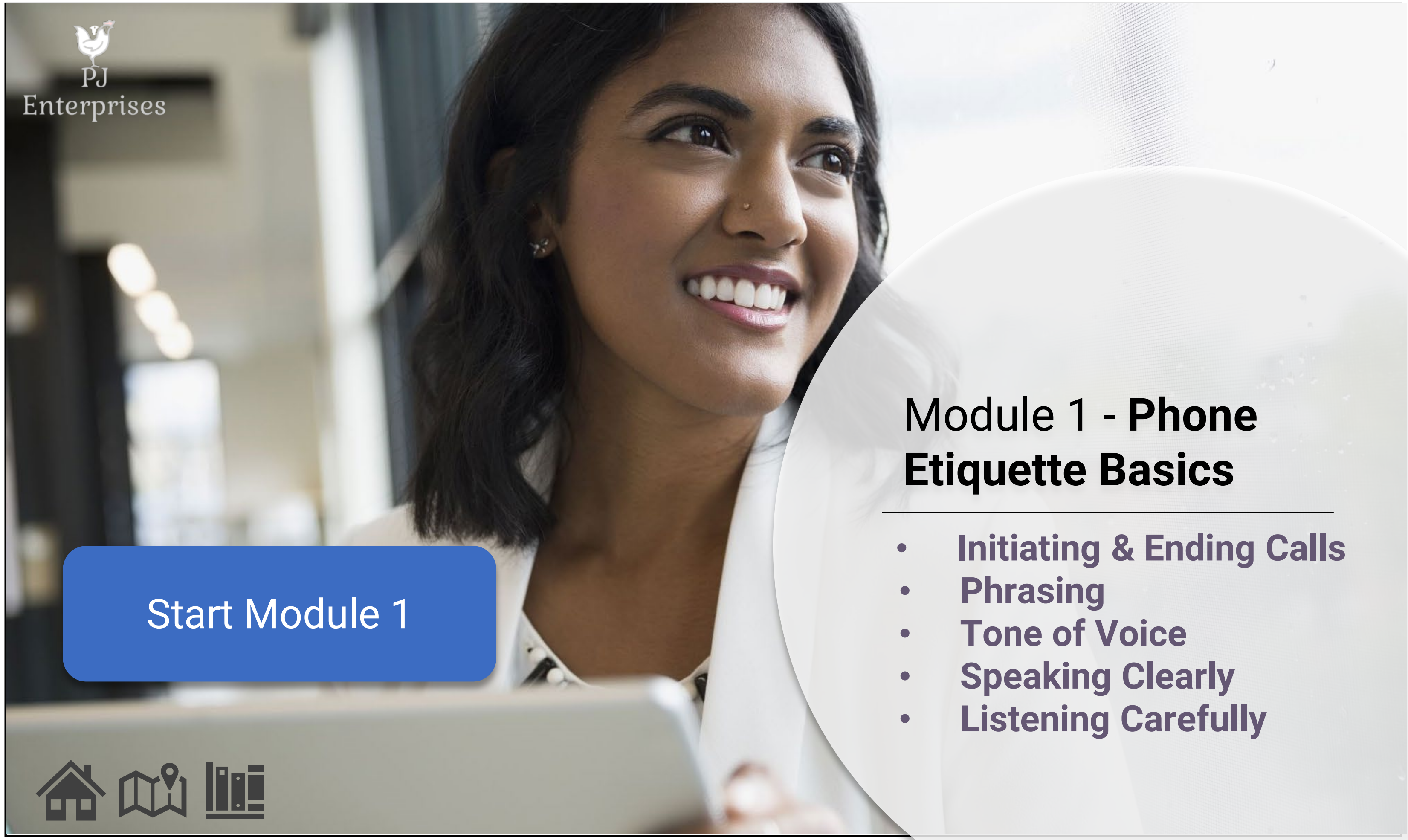
Audio Information/Description

- None for this slide

Questions, Comments, Misc. Notes

- Course map near the end of the course (while the learner is completing module 4)
- Note: if the user is on any slide other than a module slide, remove the “You are here” arrow.

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Start Screen	Screen #	4	Date	5.2.2021



Programming, Animation Notes

- No animation.
- Start Module 1 buttons goes to Module 1 Menu slide

Graphics Information

- Photos of a telephone operator smiling
- PJE Logo in top left throughout
- Font: Roboto
- Text:
    - Dark: #404040
    - White
    - Light blue: #00B0F0
- PJE Colors
    - Dark blue: #0070C0
    - Light blue: #00B0F0
    - Purple: #645773
    - Dark Purple: #002060
    - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
    - On hover, a pop-up that states:
        - Return to Main Menu
        - Course Map
        - Resources

Audio Information/Description

- None

Questions, Comments, Misc. Notes

Course Name | CBT Etiquette Training – PJE | **Screen ID** | Main Menu | **Screen #** | 5 | **Date** | 5.2.2021

PJ Enterprises

Module 1 Menu

Section 1:
Starting & Ending Calls

Section 2:
Phrasing & Tone of Voice

Section 3:
Speaking Clearly &
Listening Carefully

Section 4:
Full Call Scenarios

Back

Programming, Animation Notes

- No animation.
- Once a section is completed, use the mod1.1Complete, mod1.2Complete, etc. to make the checkmark appear.
- Each button goes to each submodule's welcome slide.

Graphics Information

- Image of person at a computer.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- None for this slide

Questions, Comments, Misc. Notes

- Note: Topics 2, 3, 4 will be disabled until the previous topic is complete.

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 1 Video	Screen #	6	Date	5.2.2021

PJ Enterprises

Welcome to Section 1: Starting and Ending Calls

Back

Next

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Video Information/Description

See below.

The videos will utilize several of Mayer's Principles of Multimedia Design. The Segmenting principle calls for shorter videos instead of longer ones and this topic will be broken into four videos. The content will be managed to reduce cognitive overload by using the Coherence (excluding extraneous info), Signaling (using cued to draw attention to important information), and Spatial contiguity (keeping text/graphics close together) principles.

Questions, Comments, Misc. Notes

- A transcript of all videos will be available to learners.
- See video storyboards for video-specific details.

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1, Section 1, Knowledge Check 1	Screen #	7.0	Date	5.2.2021

PJ Enterprises

1 of 2

Starting & Ending Calls Knowledge Check

Choose the best phrase for initiating a call at PJ Enterprises.

- Hey. Thanks for calling PJ Enterprises. How can I help you?
- Greetings. Thank you for calling customer service. How can I help you?
- Hello and thank you for calling PJ Enterprises. How can I help you?
- Hello and thank you for calling PJ Enterprises. This is _____ speaking. How can I help you?

Check Answer

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)
- Standard pick-one question in Storyline.
  - Be sure to enable unlimited attempts

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Selected and hover color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

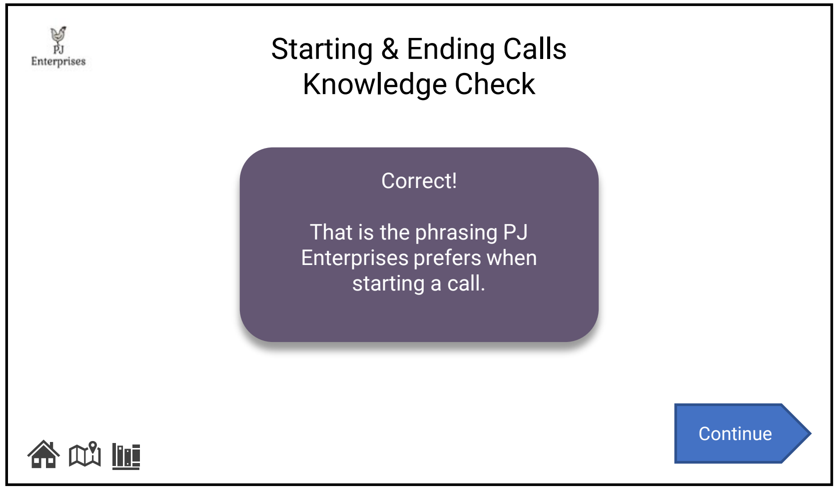
Audio Information/Description

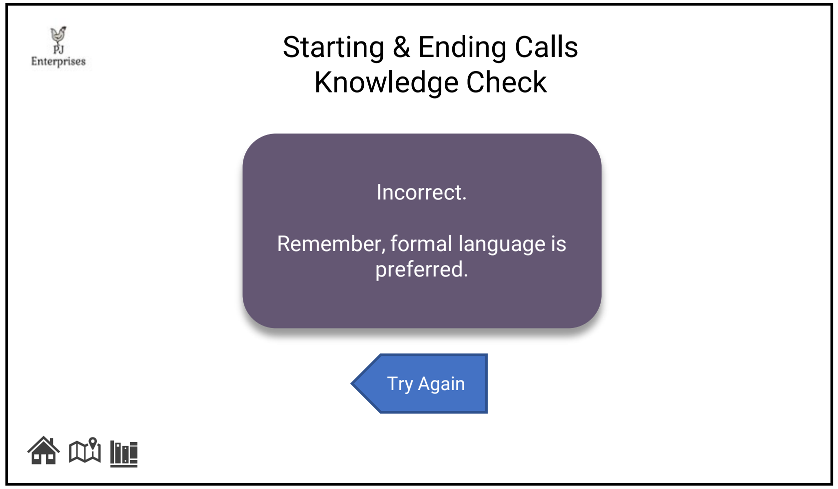
- This knowledge check for the video is based on the Mager-style, behavior-based learning objectives. In this case, one enabling objective calls for the learner "…to start and end a call using proper phrasing." The video covers the way to start a call, which is being tested above.
- This pick-one question was chosen because it fits this particular task perfectly. There are many ways to say you are transferring someone, but the learner must pick the one PJE requires.

Questions, Comments, Misc. Notes

Note: answers are all purple and the hover and selected state is orange.

Course Name	CBT Etiquette Training – PJE	Screen ID	M1 S1 KC1 Feedback Screen	Screen #	7.1	Date	5.2.2021





Programming, Animation Notes

- No animation.

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- **Elaborated feedback** will be provided for correct answers.
- For **remediation**, the user will try the questions again until correct. There will also be a short description why their answer is incorrect.

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1, Section 1, Knowledge Check 1	Screen #	8.0	Date	5.2.2021

PJ Enterprises

Starting & Ending Calls Knowledge Check

Choose the best phrase for initiating a call at PJ Enterprises.

- Thanks. Bye.
- Thanks for calling customer support. Have a nice day.
- Thank you for calling customer support. Goodbye.
- Have a good one.

Check Answer

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)
- Standard pick-one question in Storyline.
  - Be sure to enable unlimited attempts

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Selected and hover color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

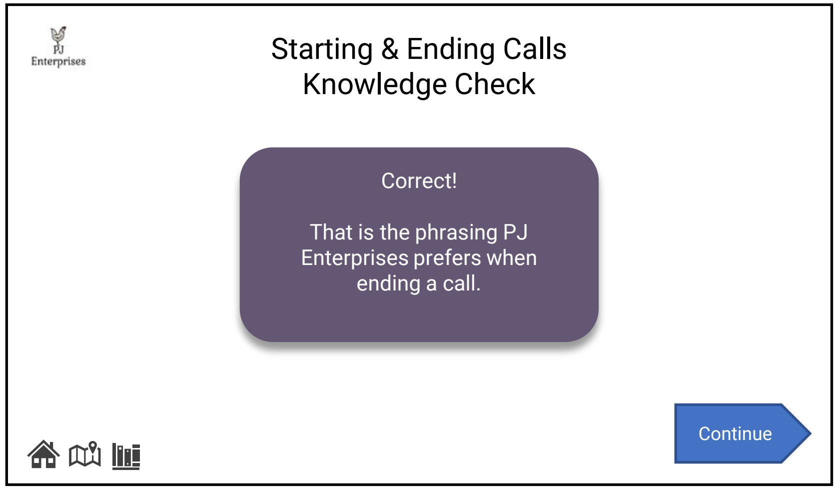
Audio Information/Description

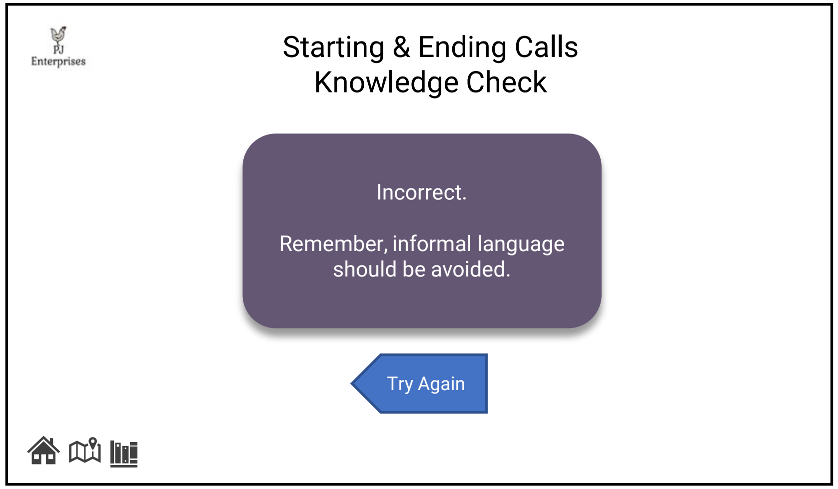
- This knowledge check for the video is based on the Mager-style, behavior-based learning objectives. In this case, one enabling objective calls for the learner "…to start and end a call using proper phrasing." The video covers the way to start a call, which is being tested above.
- This pick-one question was chosen because it fits this particular task perfectly. There are many ways to say you are transferring someone, but the learner must pick the one PJE requires.

Questions, Comments, Misc. Notes

Note: answers are all purple and the hover and selected state is orange.

Course Name	CBT Etiquette Training – PJE	Screen ID	M1 S1 KC1 Feedback Screen	Screen #	8.1	Date	5.2.2021





Programming, Animation Notes

- No animation.

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- **Elaborated feedback** will be provided for correct answers.
- For **remediation**, the user will try the questions again until correct. There will also be a short description why their answer is incorrect.

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S1, Scenario 1	Screen #	9.0	Date	5.2.2021

PJ Enterprises

Starting & Ending Calls Scenario

1 of 4

Listen to the scenario and select if the operator initiated the call appropriately.

Click to Listen to a Scenario

Yes

No

Check Answer

Back

Audio Information/Description

Phone rings.

Operator: Hello and thank you for calling PJ Enterprises. This is Jacob speaking. How can I help you?

- **This authentic assessment** mimics as closely as possible the conditions of a customer service call – audio only – and real issues and deficiencies the operators might face.

Questions, Comments, Misc. Notes

Note: answers are all purple and the hover and selected state is orange.

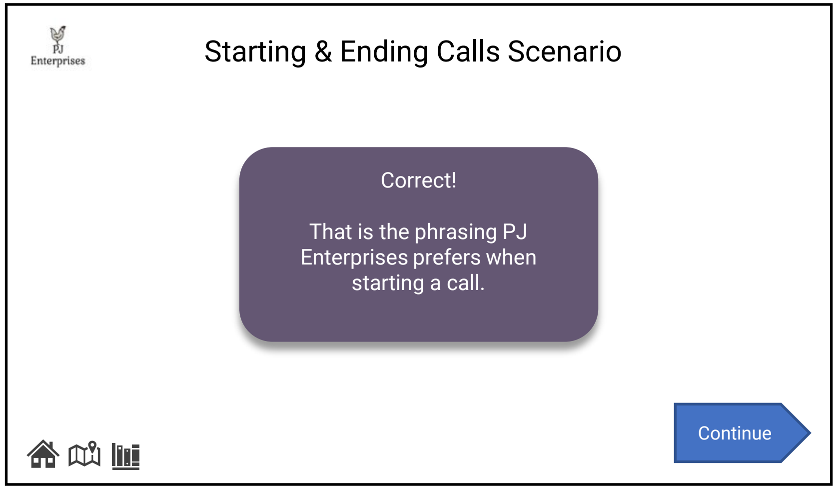
Programming, Animation Notes

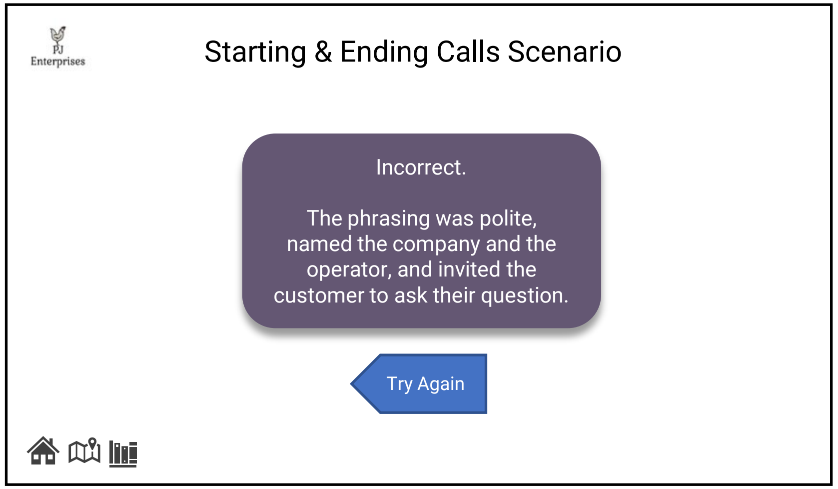
- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)
- Standard pick-one question in Storyline.
  - Be sure to enable unlimited attempts

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Course Name | CBT Etiquette Training – PJE | **Screen ID** | M1 S1 Scenario 1 Feedback Screen | **Screen #** | 9.1 | **Date** | 5.2.2021





Programming, Animation Notes

- No animation.

Graphics Information

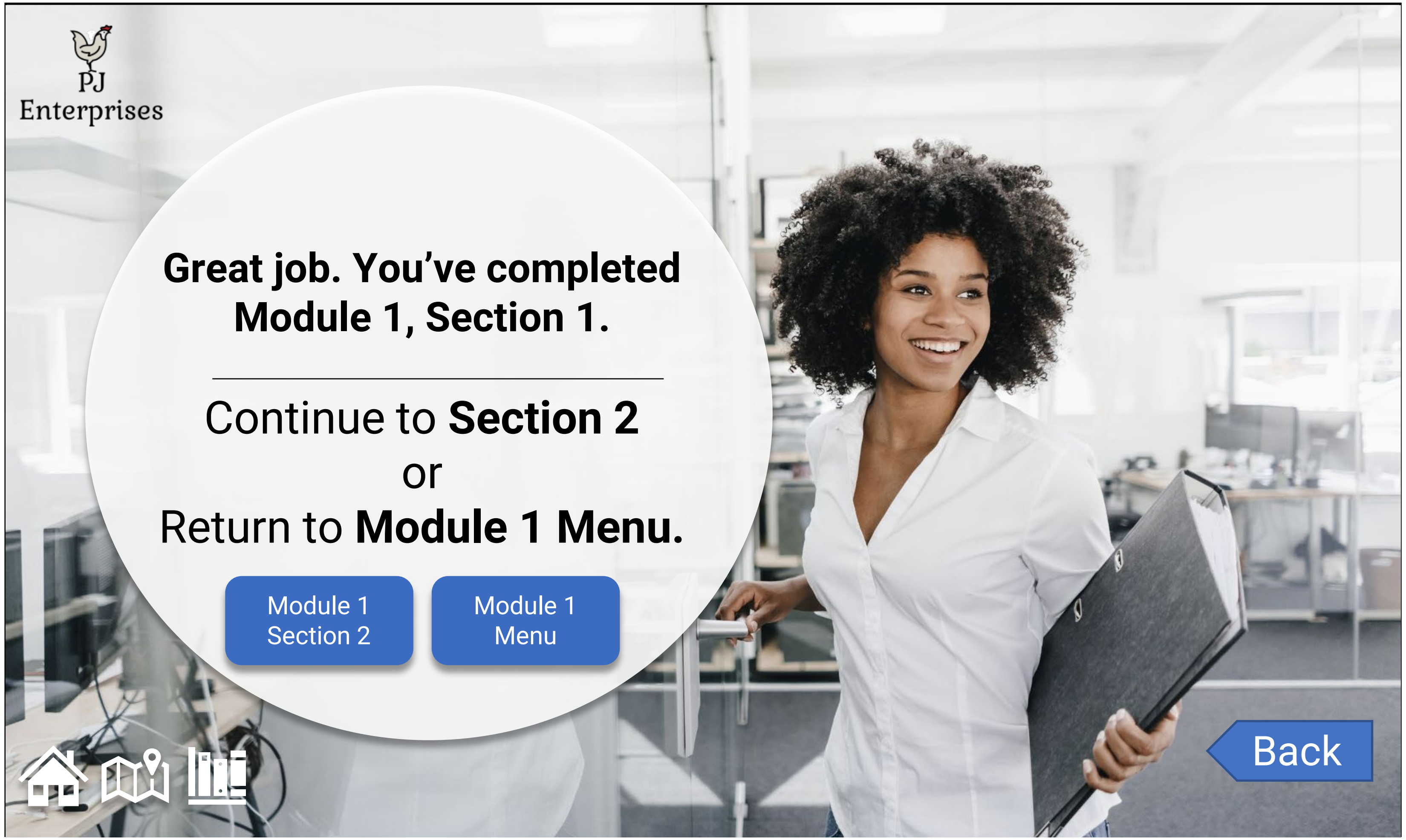
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- **Elaborated feedback** will be provided for correct answers.
- For **remediation**, the user will try the questions again until correct. There will also be a short description why their answer is incorrect.

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 1 Complete Slide	Screen #	13	Date	5.2.2021



Programming, Animation Notes

- No animation.
- Add a trigger that will change the variable mod1.1Complete from false to true when they hit this slide to activate module 1 section 2 and to unlock that button in the course map.
- Module 1 Section 2 button takes user to that section's welcome slide.

Graphics Information

- A photo of a smiling office worker.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 2 Video	Screen #	14	Date	5.2.2021

PJ Enterprises

Welcome to Section 2: Phone Etiquette - Phrasing and Tone of Voice

Back Next

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Selected and hover color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Video Narration

Narrator: *With so much communication happening through texting and messengers, we don't get many opportunities to practice good phone etiquette. In this video, I want to discuss two of the four basic features of good phone etiquette – phrasing and tone of voice.*

Starting with phrasing, the way you speak on the telephone with a friend or family member differs than with a stranger. Using more formal and professional phrasing can help make the customer feel like they are dealing with a reliable person and company. For example, "thank you" instead of "thanks" is more professional… Also, try to avoid colloquialisms like could'ja or what'cha…

Questions, Comments, Misc. Notes

- A transcript of all videos will be available to learners.
- See video storyboards for video-specific details.

Course Name | CBT Etiquette Training – PJE | **Screen ID** | M1, S2, Scenario 1 | **Screen #** | 15.0 | **Date** | 5.2.2021

PJ Enterprises

Phrasing and Tone of Voice Scenario

Listen to the scenario and select what the operator did wrong.

Click to Listen to a Scenario

The operator's tone of voice was inappropriate.

The operator was not listening carefully and kept interrupting.

The operator's phrasing was too informal.

Check Answer

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)
- Standard pick-one question in Storyline.
  - Be sure to enable unlimited attempts

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

Phone rings. Operator: (Polite tone) Thanks for callin' PJE's customer service. How may I help you today?

Customer: Hi. I have a question about a product. I believe the product number is #10592B. Does that come in blue?

Operator: (Polite tone,) No problem! I'll look that up in a jiffy. Could'ja hold on a second. This computer has been acting up all day.

Customer: Yes. That's fine.

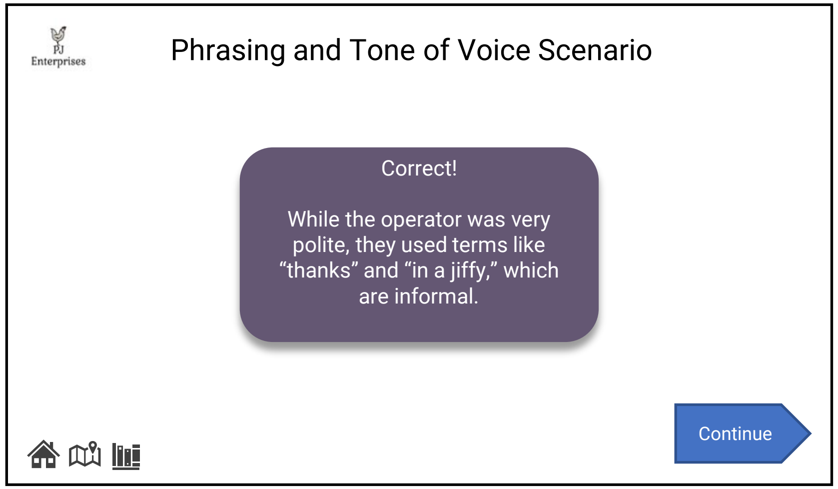
Operator: Thanks a bunch!

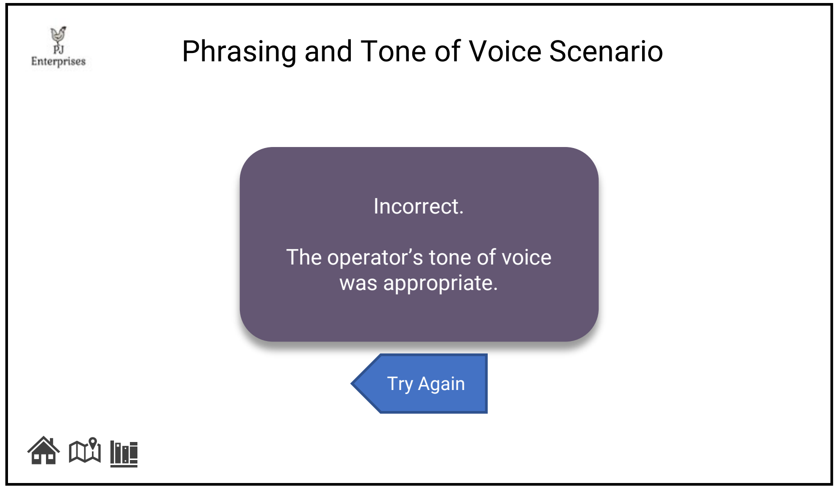
- **This authentic assessment** mimics as closely as possible the conditions of a customer service call – audio only – and real issues and deficiencies the operators might face.

Questions, Comments, Misc. Notes

Note: answers are all purple and the hover and selected state is orange.

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S2, Scenario 1 Feedback Screen	Screen #	15.1	Date	5.2.2021





Programming, Animation Notes

- No animation.

Graphics Information

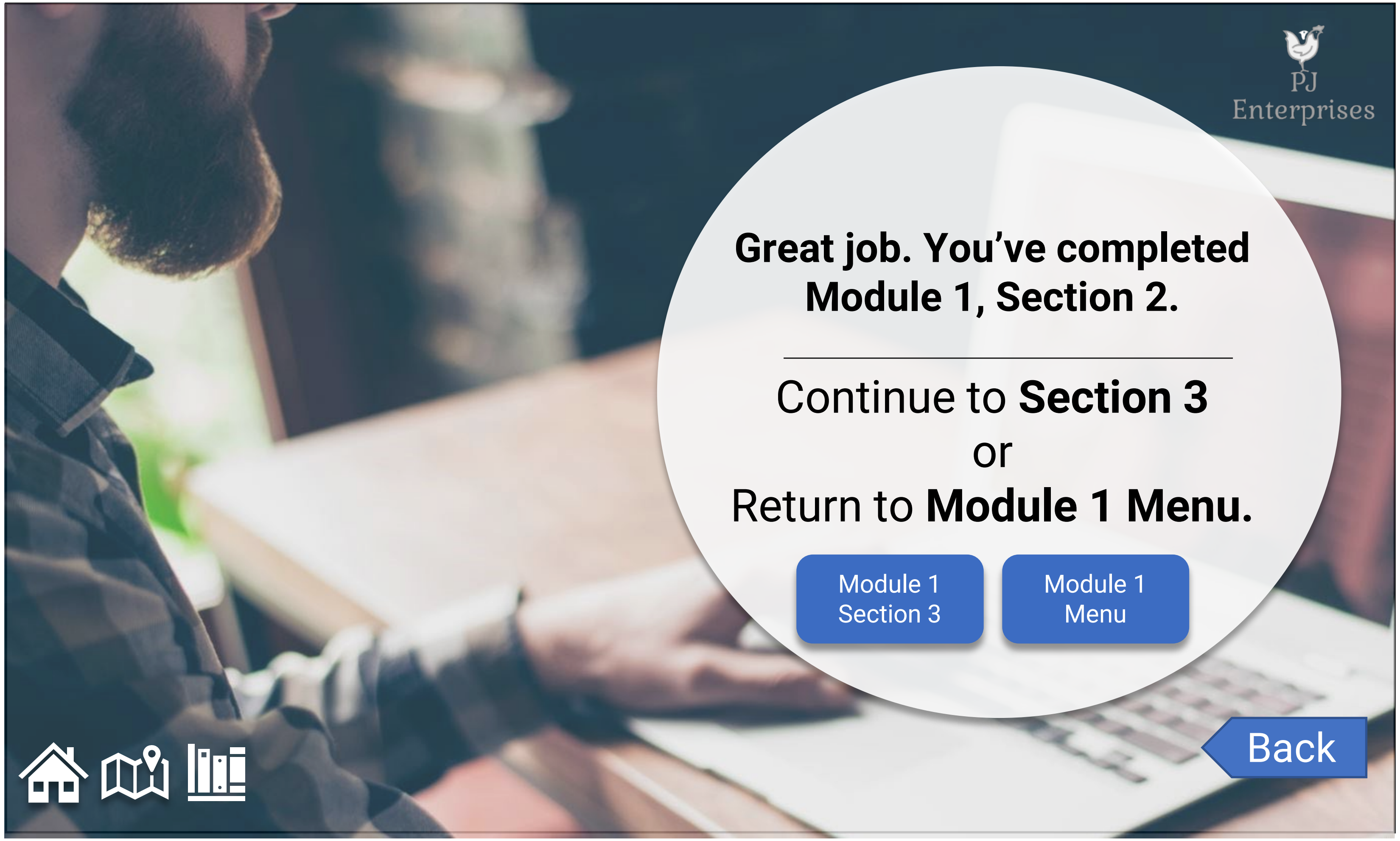
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- **Elaborated feedback** will be provided for correct answers.
- For **remediation**, the user will try the questions again until correct. There will also be a short description why their answer is incorrect.

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 2 Complete Slide	Screen #	18	Date	5.2.2021



Programming, Animation Notes

- No animation.
- Add a trigger that will change the variable mod1.2Complete from false to true when they hit this slide to activate module 1 section 3 and to unlock that button in the course map.
- Module 1 Section 3 button takes user to that section's welcome slide.

Graphics Information

- A photo of a person at a computer.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 3 Video	Screen #	19	Date	5.2.2021

PJ Enterprises

Welcome to Section 3: Phone Etiquette - Speaking Clearly & Listening Carefully

Back Next

Video Narration

See below.

Questions, Comments, Misc. Notes

- A transcript of all videos will be available to learners.
- See video storyboards for video-specific details.

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Selected and hover color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S3, Scenario 1	Screen #	20.0	Date	5.2.2021

PJ Enterprises

Speaking Clearly & Listening Carefully Scenarios

1 of 4

Listen to the scenario and select what the operator did wrong.

Click to Listen to a Scenario

- The operator's tone of voice was inappropriate.
- The operator was not listening carefully and kept interrupting.
- The operator was not speaking in a clear voice.

Check Answer

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)
- Standard pick-one question in Storyline.
  - Be sure to enable unlimited attempts

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

Phone rings. Operator: (Polite tone, clear voice) Thank you for calling PJE's customer service. How may I help you today?

Customer: Hi. I am having a problem with m--.

Operator: (Polite tone, clear voice) I'm sorry. Could I put you on hold for a moment, please?

Customer: Sure. No pr---.

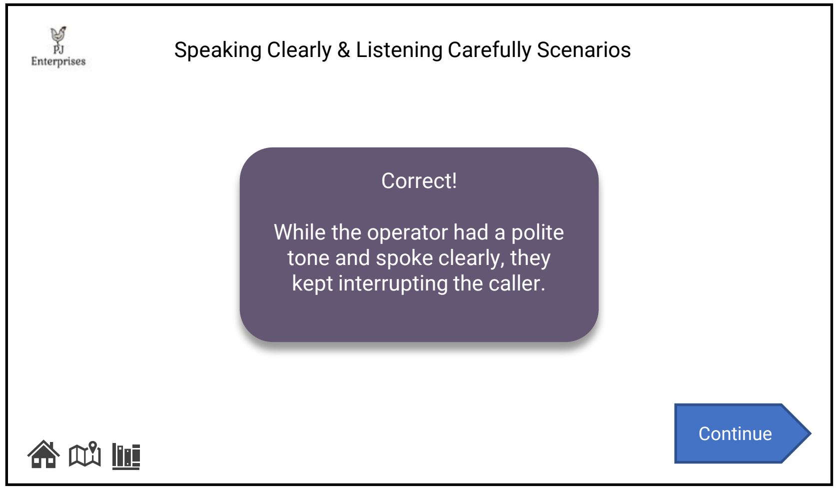
Operator: Thank you!

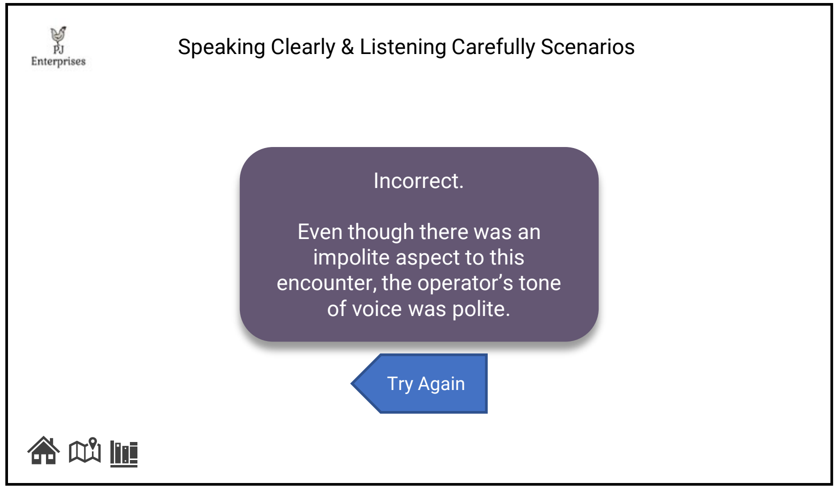
- **This authentic assessment** mimics as closely as possible the conditions of a customer service call – audio only – and real issues and deficiencies the operators might face.

Questions, Comments, Misc. Notes

Note: answers are all purple and the hover and selected state is orange.

Course Name	CBT Etiquette Training – PJE	**Screen ID**	M1, S1 Scenario 1 Feedback Screen	**Screen #**	20.1	**Date**	5.2.2021





Programming, Animation Notes

- No animation.

Graphics Information

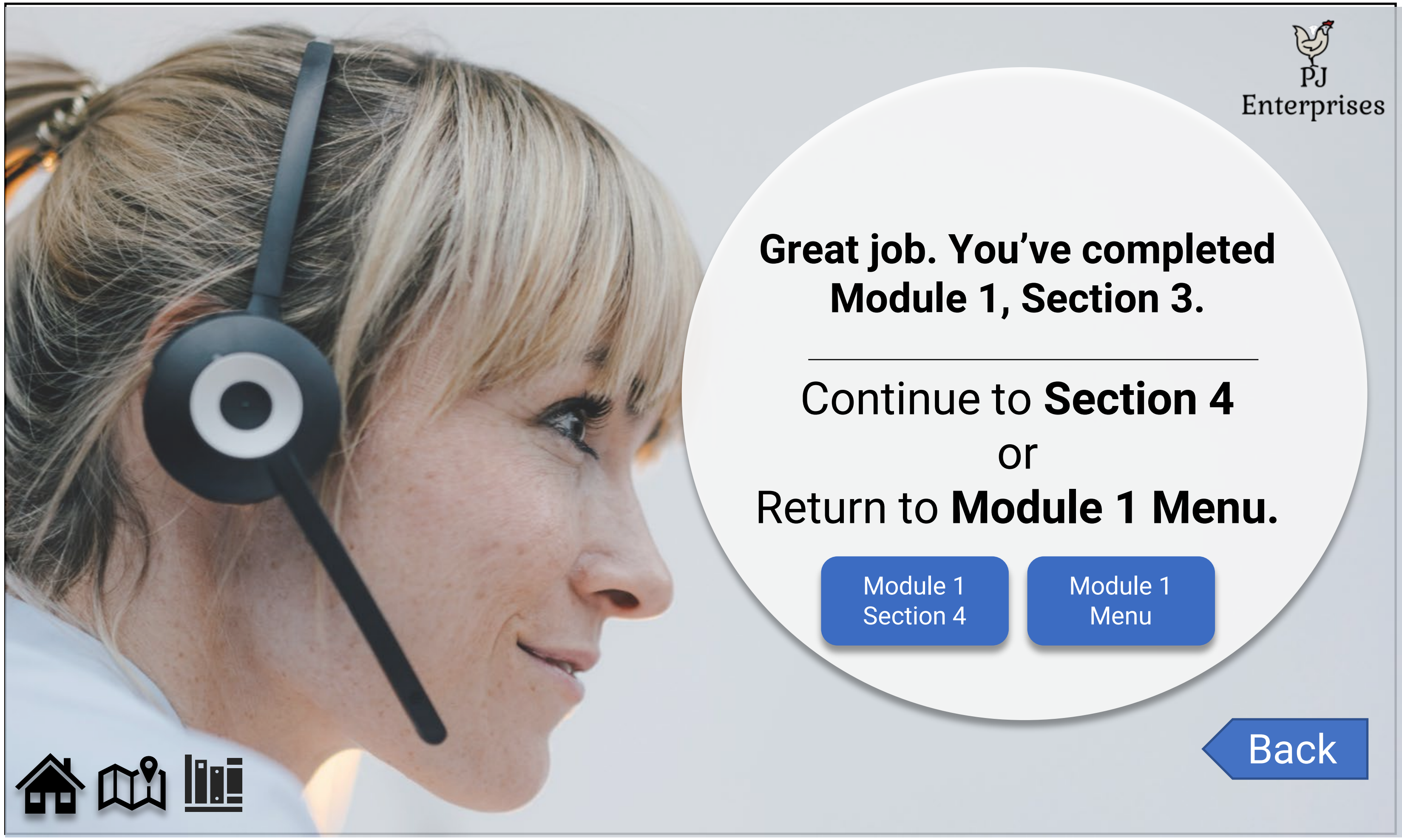
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- **Elaborated feedback** will be provided for correct answers.
- For **remediation**, the user will try the questions again until correct. There will also be a short description why their answer is incorrect.

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 3 Complete Slide	Screen #	24	Date	5.2.2021



Audio Information/Description

Questions, Comments, Misc. Notes

Programming, Animation Notes

- No animation.
- Add a trigger that will change the variable mod1.3Complete from false to true when they hit this slide to activate module 1 section 4 and to unlock that button in the course map.
- Module 1 Section 4 button takes user to that section's welcome slide.

Graphics Information

- A photo of a smiling office worker.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
    - Dark #404040
    - White
    - Light blue: #00B0F0
- PJE Colors
    - Dark blue: #0070C0
    - Light blue: #00B0F0
    - Purple: #645773
    - Dark Purple: #002060
    - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
    - On hover, a pop-up that states:
        - Return to Main Menu
        - Course Map
        - Resources

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Section 4 Video	Screen #	25	Date	5.2.2021

PJ Enterprises

Welcome to Section 4:
Full Call Scenarios

Back Next

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
    - Dark #404040
    - White
    - Light blue: #00B0F0
- PJE Colors
    - Dark blue: #0070C0
    - Light blue: #00B0F0
    - Purple: #645773
    - Dark Purple: #002060
    - Orange: #C55A11
        - Selected and hover color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
    - On hover, a pop-up that states:
        - Return to Main Menu
        - Course Map
        - Resources

Video Narration

- See below

Questions, Comments, Misc. Notes

- A transcript of all videos will be available to learners.
- See video storyboards for video-specific details.

Course Name | CBT Etiquette Training – PJE | **Screen ID** | M1, S4, Scenario | **Screen #** | 26 | **Date** | 5.2.2021

PJ Enterprises

Full Call Scenario

1 of 6

Begin the scenario and select the appropriate response.
Hover to hear the responses spoken.

Click to Start the Scenario

Hello and thank you for calling PJ Enterprises. This is Maggie speaking. What can I do for you?

Hi and thank you for calling PJ Enterprises. This is Maggie speaking.

Hello and thank you for calling PJ Enterprises. This is Maggie speaking. How can I help you?

Back

Audio Information/Description

- The phone rings twice when the learner presses the button and nothing more.
- On hover, each of the responses will be spoken.

Questions, Comments, Misc. Notes

Question points from top to bottom. Add that number to variable mod1.4Scenario when clicked.

- 15
- 5
- 20

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)
- **Note for slides 26-31.3**: There are three answers – a best, then two that are varying levels of bad, but one will be better than the other. Each answer will have a value. The best answer will be worth 20 each time. The others will depend according to their "badness" level, but generally their scores will range between 0-10. It is possible to pass even if they choose a second-level answer once or twice.
- Set up a variable (mod1.4Scenario) that adds the value of the chosen answer to the variable. In the end, it will trigger one of three feedback screens (see slide #32.1 – 32.3)
  - If mod1.4Scenario = 120 then slide #32.1
  - If mod1.4Scenario <= 85 then slide #32.2
  - If mod1.4Scenario >= 84 then slide #32.3

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Course Name | CBT Etiquette Training – PJE | **Screen ID** | M1, S4, Scenario | **Screen #** | 27 | **Date** | 5.2.2021

PJ Enterprises

Full Call Scenario

2 of 6

Continue the scenario and select the appropriate response.
Hover to hear the responses spoken.

Click to Continue the Scenario

Yeah. That's fine. You gotta order number?

Yes, you can. May I have your order number, please.

Yes. That's possible.

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- Customer: I ordered a cat statue last week and I received a blue one instead of the green one I ordered. Can I exchange for the green one?
- On hover, each of the responses will be spoken.

Questions, Comments, Misc. Notes

Question points from top to bottom. Add that number to variable mod1.4Scenario when clicked.

- 10
- 20
- 5

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S4, Scenario	Screen #	28	Date	5.2.2021

PJ Enterprises

Full Call Scenario

3 of 6

Continue the scenario and select the appropriate response.
Hover to hear the responses spoken.

Click to Continue the Scenario

Let me confirm. That was #903958A.

Could you repeat that, please?

You speak fast. Was that #902958A.

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- Customer: Sure. Are you ready? It is product (voice actor speaks this extremely clearly so that it would be hard for the operator to mess this up) #903958A.
- (For the second response) Customer: Yes. It is #903958A.
- On hover, each of the responses will be spoken.

Questions, Comments, Misc. Notes

Question points from top to bottom. Add that number to variable mod1.4Scenario when clicked:

- 20
- -
- 5

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S4, Scenario	Screen #	29	Date	5.2.2021

PJ Enterprises

Full Call Scenario

4 of 6

Continue the scenario and select the appropriate response.
Hover to hear the responses spoken.

Click to Continue the Scenario

OnemomentpleasewhileIcheckyouraccount. …Ok. I just issued a refund. Could'ja send back that blue cat.

I gotta check on that. Can you hang on a second?...I just did a refund. You will need to send that blue cat back. OK?

One moment, please, while I check your account…So, I just issued a refund. Could you please send us back the blue cat?

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- Customer: That's right.
- On hover, each of the responses will be spoken.

Questions, Comments, Misc. Notes

Question points from top to bottom. Add that number to variable mod1.4Scenario when clicked.

- 5
- 10
- 20

Course Name | CBT Etiquette Training – PJE | **Screen ID** | M1, S4, Scenario | **Screen #** | 30 | **Date** | 5.2.2021

PJ Enterprises

Full Call Scenario

5 of 6

Continue the scenario and select the appropriate response.
Hover to hear the responses spoken.

Click to Continue the Scenario

And thank you for calling customer service. Is there anything else I can help you with.

When can you send it?

Thanks for calling PJ Enterprises. Is there anything else I can help you with.

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- Customer: Sure. I can send it today. Thank you so much for your help.
- On hover, each of the responses will be spoken.

Questions, Comments, Misc. Notes

Question points from top to bottom. Add that number to variable mod1.4Scenario when clicked.

- 15
- 1
- 20

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S4, Scenario	Screen #	31	Date	5.2.2021

PJ Enterprises

Full Call Scenario

Continue the scenario and select the appropriate response.
Hover to hear the responses spoken.

Click to Continue the Scenario

Huh? Oh sure. Bye.

You, too. Goodbye.

Sure. You, too. Bye.

Back

Programming, Animation Notes

- Quick swipe of the title (.5 seconds)
- The rest fades in (.75 seconds)

Graphics Information

- A photo of an operator on a call.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
    - Hover and selected color
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- Customer: No, that’s all. Have a nice day.
- On hover, each of the responses will be spoken.

Questions, Comments, Misc. Notes

Question points from top to bottom. Add that number to variable mod1.4Scenario when clicked.

- 1
- 20
- 15

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S4, Scenario Feedback Screens	Screen #	32.1	Date	5.2.2021

PJ Enterprises

Full Call Scenario Results

You completed the scenario with a score of:

100

You selected the best answer each time.

Click to Complete Module 1

Programming, Animation Notes

- No animation.
- Based on their score, the learner could encounter three versions of this screen. This one is for a perfect score. If the variable mod1.4Scenario equals 120, reveal this slide.
- Button goes to Module 1 Complete slide.

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- None

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S4, Scenario Feedback Screens	Screen #	32.2	Date	5.2.2021

PJ Enterprises

Full Call Scenario Results

You completed the scenario with a score of:

91

You passed the assessment and selected the best answer most of the time.

Click to Complete Module 1

Programming, Animation Notes

- No animation.
- This screen is for a score between 85-99. (mod1.4Scenario)
- Button goes to Module 1 Complete slide.

Graphics Information

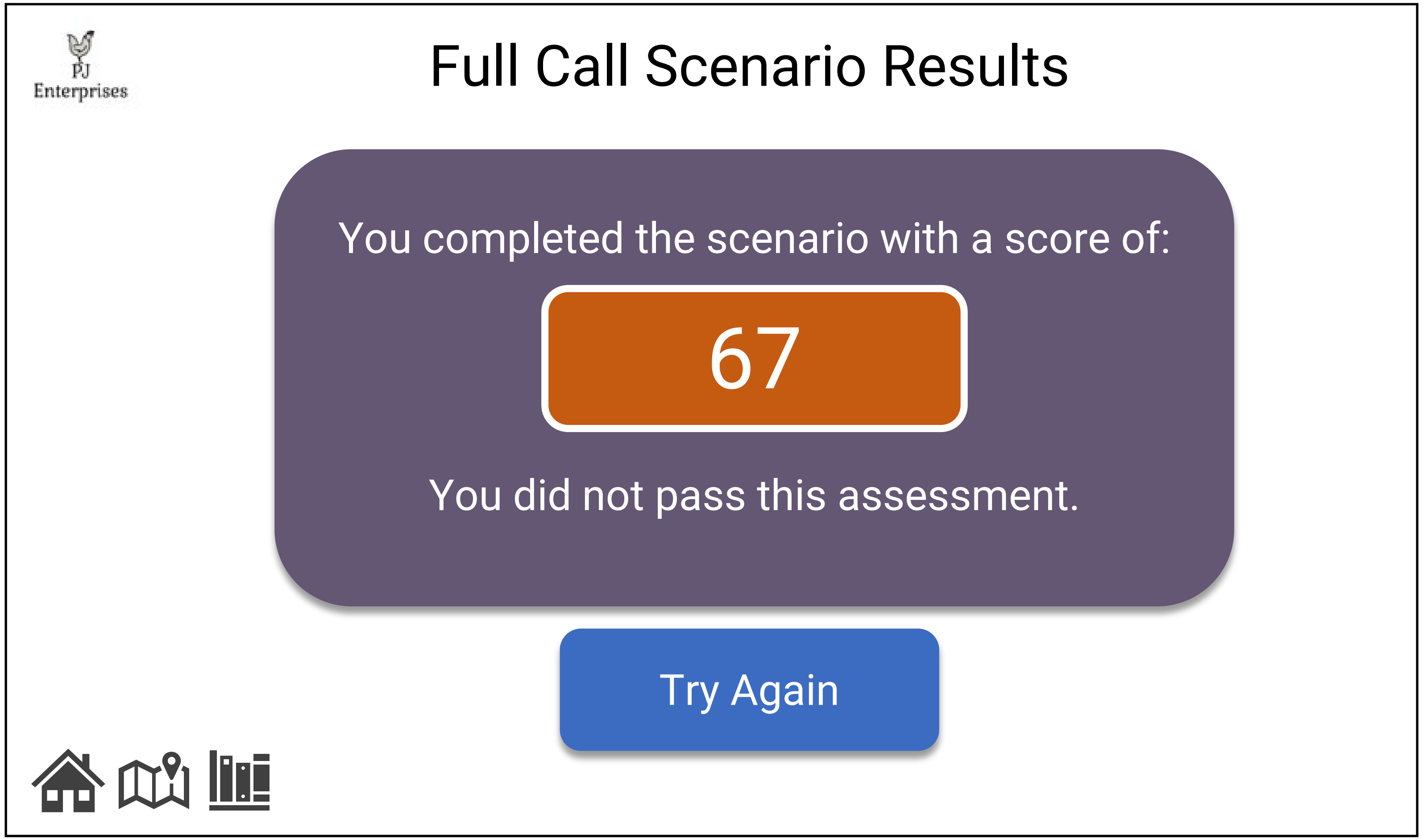
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Additional Information/Description

- None

Questions, Comments, Misc. Notes

Course Name	CBT Etiquette Training – PJE	Screen ID	M1, S4, Scenario Feedback Screens	Screen #	32.3	Date	5.2.2021



Programming, Animation Notes

- No animation.
- This screen is for a score below 85. (mod1.4Scenario)
- Try Again button returns user to slide/screen 26
- Remember to reset variable mod1.4Scenario when the user clicks the Try Again button.

Graphics Information

- PJE Logo in top left throughout
- Font: Roboto
- Text:
    - Dark #404040
    - White
    - Light blue: #00B0F0
- PJE Colors
    - Dark blue: #0070C0
    - Light blue: #00B0F0
    - Purple: #645773
    - Dark Purple: #002060
    - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
    - On hover, a pop-up that states:
        - Return to Main Menu
        - Course Map
        - Resources

Additional Information/Description

- None

Questions, Comments, Misc. Notes

Based on their score, the learner could encounter three versions of this screen. This one for a perfect score, one for the range of 85-99, and one below 85.

Course Name	CBT Etiquette Training – PJE	Screen ID	Module 1 Complete Slide	Screen #	33	Date	5.2.2021

Programming, Animation Notes

- No animation.
- Add a trigger that will change the module 1 and module 1.4 complete variables (mod1Complete and mod1.4Complete) from false to true when they hit this slide.
- Module 2 button goes to the Module 2 Welcome Slide.

Graphics Information

- A photo of a smiling office worker.
- PJE Logo in top left throughout
- Font: Roboto
- Text:
  - Dark #404040
  - White
  - Light blue: #00B0F0
- PJE Colors
  - Dark blue: #0070C0
  - Light blue: #00B0F0
  - Purple: #645773
  - Dark Purple: #002060
  - Orange: #C55A11
- Background: white
- Navigation buttons (150 by 50 px)
- On hover, do one or two shades lighter or darker unless noted otherwise.
- Submit buttons (#0070C0 border, 2¼)
- Bottom left icons: #404040; 40x40 px and are always present on all slides
  - On hover, a pop-up that states:
    - Return to Main Menu
    - Course Map
    - Resources

Audio Information/Description

- None

Questions, Comments, Misc. Notes

References

SOME LEARNING THEORIES AND INSTRUCTIONAL AND MULTIMEDIA DESIGN METHODS WERE MENTIONED THROUGHOUT THIS STORYBOARD. BELOW IS A LISTING OF REFERENCES.

On Choosing Appropriate Assessment Questions

Horton, William. *E-Learning by Design 2nd E.* Pfeiffer, 2012. See pp. 220-242.

On Feedback

Horton, William. *E-Learning by Design 2nd E.* Pfeiffer, 2012. See pp. 263-265.

On Learning Objectives

Mager, Robert F. *Preparing Instructional Objectives 3rd E.* CEP Press, 1997.

On Multimedia Learning

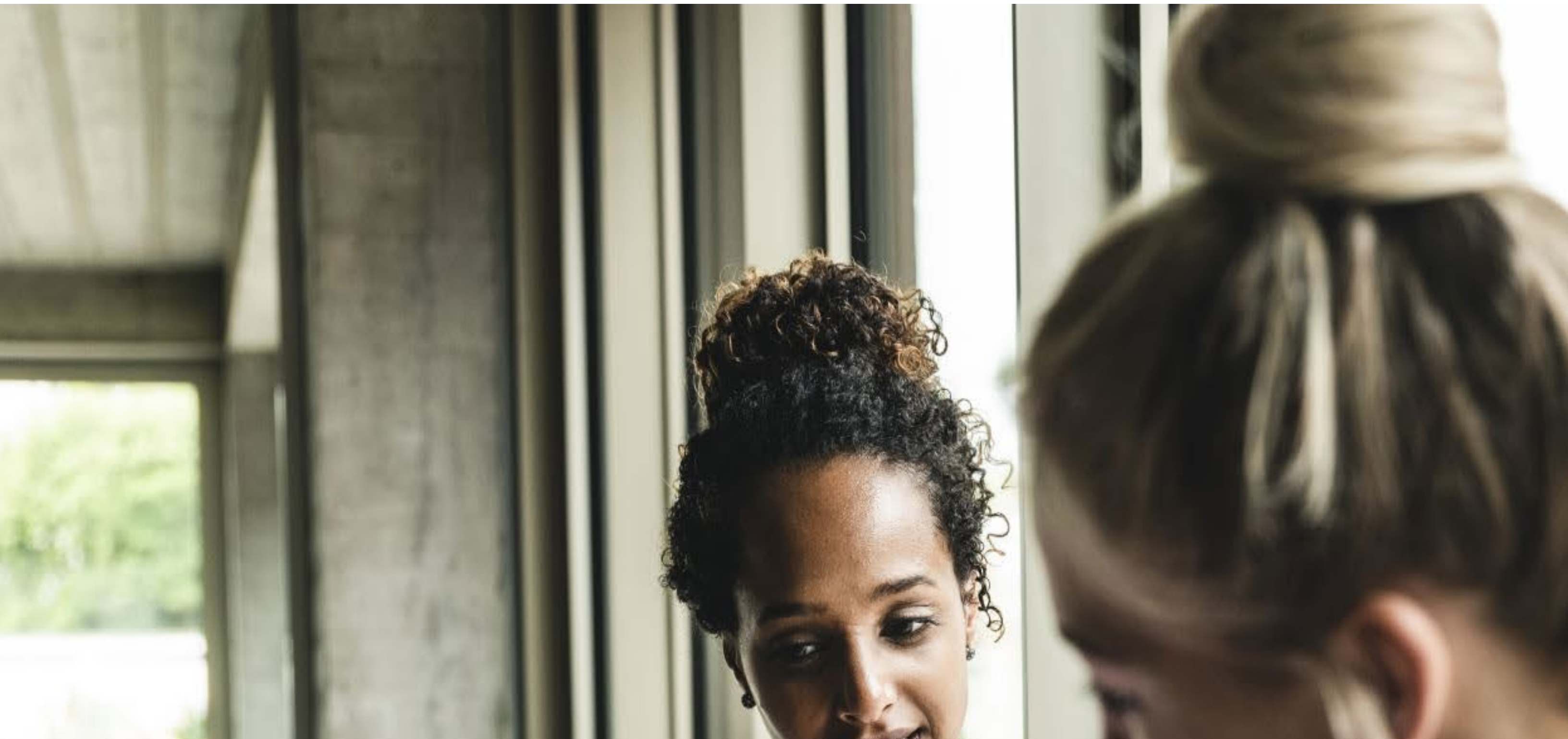
Mayer, Richard E. *Multimedia Learning 3rd E.* Cambridge University Press, 2021.

On Remediation

Morrison, Gary R. *Designing Effective Instruction 7th E. Wiley, 2013. See p.* 232.

On Universal Design for Learning

See CAST's website at www.cast.org



Module Seven: Execution Phase Documentation

Meeting Agenda & Minutes

TJP Consulting

Meeting Agenda

5/3/2021

2:00pm

Type of Meeting: Project update and stakeholder meeting

Meeting Facilitator: P.S.

Attendees:

- P.S.
- T.J.
- J.A.
- P.J.

I. Roll Call

II. Item 1

a. Discuss the bid results for the employee engagement survey.

III. Item 2

a. Discuss with project owner the need to increase training hours for the synchronous training from three hours to six.

IV. Item 3

a. Show storyboards for the asynchronous CBT modules and get project owner signoff.

V. Adjourn

TJP Consulting
Your lifelong learning partner

MEETING MINUTES

Meeting/Project Name:	Scale up Solutions & Training for PJ Enterprises		
Date of Meeting:	05/03/2021	**Time:**	2:00 PM
Minutes Prepared By:	J.A.	**Location:**	Meeting Room C and Zoom

1. Meeting Objective

- Discuss the bid results for the employee engagement survey.
- Discuss with project owner the need to increase training hours for the synchronous training from three hours to six.
- Show storyboards for the asynchronous CBT modules and get project owner signoff.

2. Attendance at Meeting

Name	Role	E-mail	Phone
P.S.	Project Manager	psorenti@tjpconsulting.com	(555) 230-0422 X504
T.J.	Trainer and ID	tjordan@tjpconsulting.com	(555) 230-0422 X505
J.A.	ID	Jallen@tjpconsulting.com	(555) 230-0422 X506
P.J.	Director of HR for PJ Enterprises	pjones@pjenterprises.com	(555) 123-4567

3. Agenda and Notes, Decisions, Issues

Topics	Owner	Time
• P.S. informed the team of the bid results for the employee engagement survey. SC Ltd. won the bid and they will proceed with the survey.	P.S.	2:02
• To provide more effective supervisor training, T.J. recommended we increase the training from a ½-day to a full-day session of six hours plus a one-hour lunch and 15-minute breaks. ○ Result: The project owner agreed and submitted the change request form.	T.J.	2:10
• J.A. completed the storyboards for the course, and they were shown to the project owner. ○ Result: Project owner signed off, and development of the course using Articulate Storyline will begin.	J.A.	2:25
• Meeting adjourned.		2:40

4. Action Items

Action	Owner	Due Date
The synchronous training needs to be expanded to six hours.	T.J.	5/10/2021
The charter, schedule, and budget need to be updated to reflect the longer synchronous training.	P.S.	5/7/2021
Asynchronous module development will begin.	J.A.	5/21/2021

5. Next Meeting (if applicable)

Date:	05/10/2021	**Time:**	2:00	**Location:**	Meeting Room C and Zoom
Objective:	• Show synchronous training materials and get sign off from project owner. • Provide a progress report for the asynchronous training.				

Change Request Form

Project Name	SCALE UP SOLUTIONS & TRAINING	Date	**May 9, 2021**
Project Number	907097284	Requestor	TJ
Project Manager	PS	Project Owner	Pat Jones

Describe the Requested Change
The synchronous training needs to be expanded from three hours to six hours.

Describe the Reason for the Request
To provide more effective supervisor training, I recommend we increase the training from a ½-day to a full-day session of six hours plus a one-hour lunch and 15-minute break

Risk Identification/Analysis
The project team may fail to identify all the activities required to create the new deliverable. The delivery date will be pushed to May 21, 2021. The budget will exceed $8880

Impact Analysis	
Work Products to be Modified	Version Number
1. The charter, schedule, and budget need to be updated to reflect the longer synchronous training.	**1.1**
2. The facilitator guidelines need to be updated to reflect a longer training	**1.1**
Describe the impact of the suggested change to work that is already complete.	

Quality Impact
Additional Quality Assurance or Quality Control Activities
1. All documentation will be updated, including WBS, communications plan, Scope and charter in order to maintain quality assurance throughout the project
We will update all collateral documentation in order to maintain our project standards, stay within scope and document reasons for changes beyond timeline and budget.

Schedule Impact			
New Deliverables Description	**Effort Hours**	Date Required	Impact to Other Delivery Dates
1. Synchronous Development (3 hours to 6 hours)	**12 additional hours**	**May 21, 2021**	**Synchronous training will need to be pushed by one week..**
2. Implementation (Managers' training - synchronous)	**3 additional hours**	**Nul**	**No impact to other delivery dates**
The written materials were originally due to be submitted May 14, 2021. Given the additional work required to create another 3 hours of training we will need to push the date of the Synchronous Development to May 21, 2021. This change to the Synchronous Development timeline will not impact other deliverable dates with the Scale Up Training & Solutions Project.			

Budget Impact			
New Deliverables Description	**Lessen or Eliminate Other Expenses? Please describe.**	Cost of New Deliverable	Total
1. Synchronous Development (3 hours to 6 hours)	**Increase in expense from 1200$ to 1800$**	**600$**	**1800$**
2. Implementation (Managers' training -synchronous)	**Increase in expense from 1440$ for 1.5 days work to 2400$ for 3 days work**	**960$**	**2400$**
The increase in training hours will increase the overall budget for the project. There will be additional development time required. The sessions will also be longer, therefore will incur more costs for the hourly rate of the trainer.			

Decision

☐ Approved	☐ Rejected
☐ Approved with modifications	☐ Deferred

Justifications

A three-hour training was not sufficient in length to train managers to train their staff. For PJ Enterprises to see benefits, it is recommended that the customer service supervisors have a one-day training with pre-work completed ahead of time. The three-hour session would not have been sufficient to allow time for experiential learning which is critical for lasting change. A full day session will allow the trainer to spend more time on the materials and going deeper into the concepts required for the customer service supervisors.

Additional Comments

A unanimous vote was in favor of extending the training.

Axel Rose

Approver's Printed Name

May 9, 2021

Date

CEO

Title

Signature

Progress Report

Project Name: Scale Up Solutions and Training **Organization:** PJ Enterprises

Project Manager: Pamela S. Date: May 10, 2021

Summary

TJP Consulting uses the productivity tool Trello to track and manage the PJ Enterprises project. Due to the scale and size of the project, Trello is a good fit. Using the Trello board, consultants get a holistic view of the project and have easy access to information. The board covers fundamental areas:

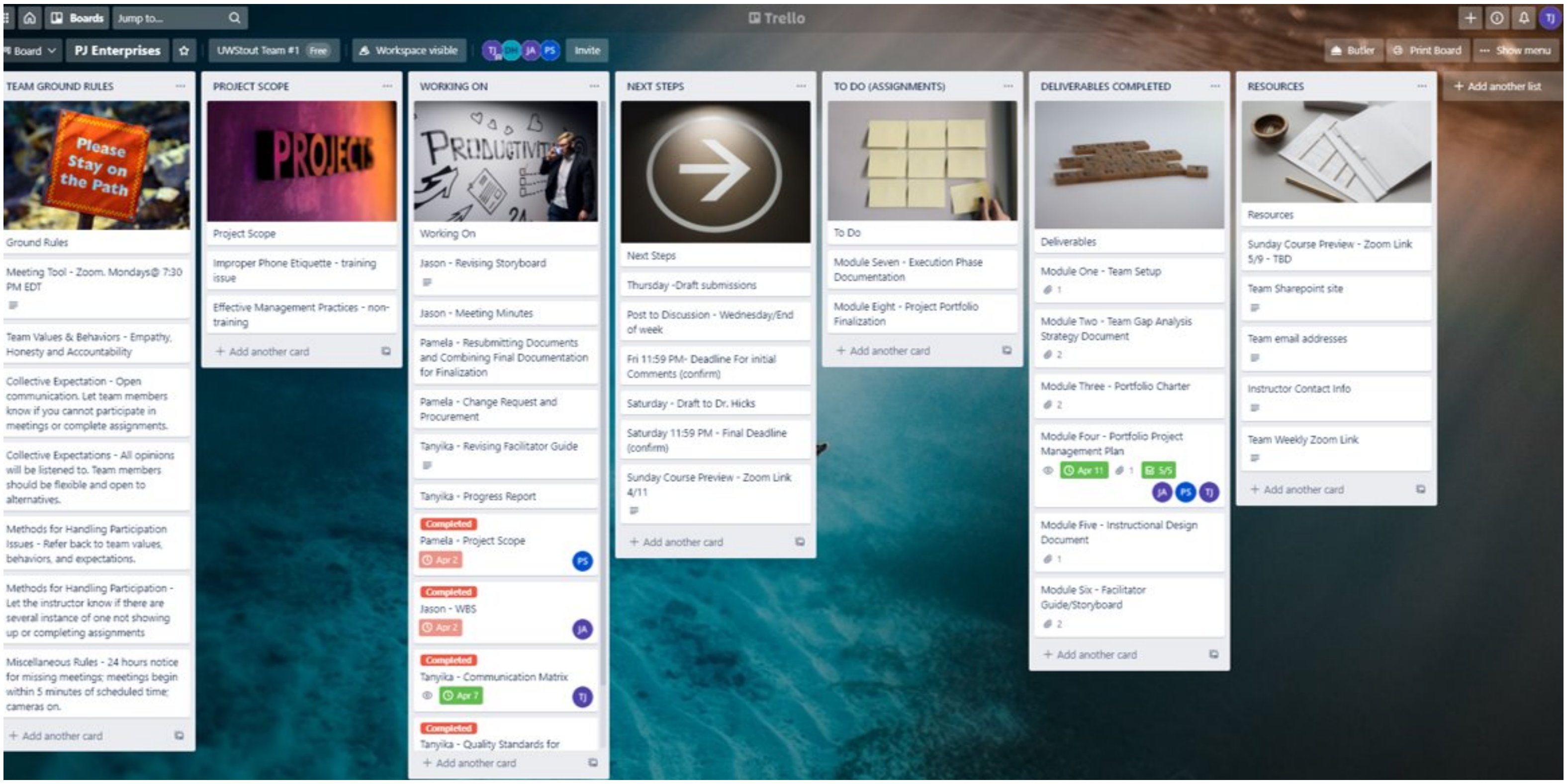
- **Team Working Agreement.** The team can refer to the governing practices each member helped establish and agreed to follow.
- **Project Scope.** The team can view the breadth of the project.
- **Planning and Work.** The team can view the task assignments, owners, statuses, and deadlines.
- **Deliverables.** At a glance, the team can view which items are completed and delivered to the client.
- **Resources.** Communication information such as meeting online links and contact information are available in this area.
-

Progress Report

During weekly team meetings, consultants provide status updates for ongoing tasks. The project manager assigns new tasks based on each consultant's area of expertise. Team members agree to deadlines, and the Trello board is updated. For tasks longer than a week, reminders are created and sent to team members automatically from the board. Completed tasks are noted on the board.

Overall Progress

The project is currently on track with one change request that will impact the delivery and budget of the Customer Supervisor Managers Training Facilitator Guide. With a new delivery date of May 21, 2021, the budget has been increased by $1,560. The Telephone Operator CBT Storyboards have been completed and approved by P. Jones, Director of HR of PJ Enterprises. The change request impacted no other deliverables. After RFP and bidding, the vendor selected to produce and deploy the employee engagement survey is Survey Company, Ltd. TJP Consulting issued the purchase order for their services.


Boards
Jump to...
Trello
Board
PJ Enterprises
UWStout Team #1 Free
Workspace visible
Invite
Butler
Print Board
Show menu
TEAM GROUND RULES
Please Stay on the Path
Ground Rules
Meeting Tool - Zoom. Mondays@ 7:30 PM EDT
Team Values & Behaviors - Empathy, Honesty and Accountability
Collective Expectation - Open communication. Let team members know if you cannot participate in meetings or complete assignments.
Collective Expectations - All opinions will be listened to. Team members should be flexible and open to alternatives.
Methods for Handling Participation Issues - Refer back to team values, behaviors, and expectations.
Methods for Handling Participation - Let the instructor know if there are several instance of one not showing up or completing assignments
Miscellaneous Rules - 24 hours notice for missing meetings; meetings begin within 5 minutes of scheduled time; cameras on.
Add another card
PROJECT SCOPE
PROJECTS
Project Scope
Improper Phone Etiquette - training issue
Effective Management Practices - non-training
Add another card
WORKING ON
PRODUCTIVITY
Working On
Jason - Revising Storyboard
Jason - Meeting Minutes
Pamela - Resubmitting Documents and Combining Final Documentation for Finalization
Pamela - Change Request and Procurement
Tanyika - Revising Facilitator Guide
Tanyika - Progress Report
Completed
Pamela - Project Scope
Apr 2
Completed
Jason - WBS
Apr 2
Completed
Tanyika - Communication Matrix
Apr 7
Completed
Tanyika - Quality Standards for
Add another card
NEXT STEPS
Next Steps
Thursday -Draft submissions
Post to Discussion - Wednesday/End of week
Fri 11:59 PM- Deadline For initial Comments (confirm)
Saturday - Draft to Dr. Hicks
Saturday 11:59 PM - Final Deadline (confirm)
Sunday Course Preview - Zoom Link 4/11
Add another card
TO DO (ASSIGNMENTS)
To Do
Module Seven - Execution Phase Documentation
Module Eight - Project Portfolio Finalization
Add another card
DELIVERABLES COMPLETED
Deliverables
Module One - Team Setup
Module Two - Team Gap Analysis Strategy Document
Module Three - Portfolio Charter
Module Four - Portfolio Project Management Plan
Apr 11
5/5
Module Five - Instructional Design Document
Module Six - Facilitator Guide/Storyboard
Add another card
RESOURCES
Resources
Sunday Course Preview - Zoom Link 5/9 - TBD
Team Sharepoint site
Team email addresses
Instructor Contact Info
Team Weekly Zoom Link
Add another card
Add another list

Purchase Order

Procurement Process & Documentation

Request for proposal "Employee Engagement Survey Design & Deployment" (RFP#201987) was submitted to the surveybid.org platform on April 15, 2021, with a bidding deadline of April 20, 2021.

Of the 20 bidding companies, Survey Company Ltd.'s proposal best met the needs of TJP Consulting. Survey Company Ltd's bid came in with more detail, resources and without tremendously exceeding budgetary constraints of the Scale Up Training & Solutions project. The PMO coordinated and finalized the procurement process in accordance with the state of New York's guidelines.

A purchase agreement was drafted and signed by both parties (see below). The agreement outlines the major deliverables, timeline, pricing and payment terms as well as quality and acceptance criteria. Also included in the documentation are the general terms and conditions and termination clauses.

Page Break

PURCHASE AGREEMENT

BETWEEN:

TJP CONSULTING

123 JERSEY CITY
NEW YORK, NEW YORK 90210

And:

Survey Company Ltd.

1001 Starburst St. West,
Montego Bay, New Jersey 80976

GENERAL TERMS

PJ Enterprises is a mail-order company that specializes in gifts, apparel, and home accessories. For the upcoming year, **PJ Enterprises** has four goals including reaching or exceeding their projected sales, customer lists, and profit targets as well as improving customer-service scores, work environment, and staff development opportunities. The company is experiencing several issues in these areas including customer loss because of poor customer service, employee dissatisfaction and high employee turnover, and challenges related to the hiring and training of new employees.

TJP Consulting has been hired to deploy an Employee engagement survey and provide a subsequent analysis report which will detail recommendations to further improve communication, create clearer policies and identify staff development opportunities.

TJP Consulting is engaging with **Survey Company Ltd**. to create and deploy an employee engagement survey for PJ Enterprises.

1. DELIVERABLES AND CORRESPONDING FEES

- A 25-question survey designed and deployed - charged to TJP at -$400
- Deployment is performed via electronic mail. A link is sent to employees to answer survey questions anonymously.

2. ABOVE FEE INCLUDES

Survey design

- Assumes 1.5 workdays at $120 per day
- Design updates (a maximum of 3 rounds of changes)
- Coordination & Program Management

Survey deployment

- Assumes the deployment to employee groups (1 day at $160)
- Deployment is conducted by email.

3. QUALITY & ACCEPTANCE CRITERIA

- Survey distributed to employee groups by email with secure link to anonymous survey.
    - Email list to be provided to Consulting Survey Ltd. By TJP Consulting no later than May 9, 2021.
- Survey Result collected and provided to TJP Consulting on May 12, 2021
    - Survey results provided as quantitative and qualitative data sets using Tableau software. Qualitative data represented in graphs as well as numerically.

4. GENERAL CONDITIONS

Agents and employees of Survey Company Ltd. agree to hold confidential any information they may acquire about PJ Enterprises and its activities during the project.
All Intellectual Property in pre-existing materials used in the development and deployment of the employee engagement survey shall be retained by the Party contributing such Intellectual Property. These materials are not authorized for reproduction or subsequent internal use by PJ Enterprises without the express written consent of Survey Company Ltd.
No party to this Agreement shall be held responsible for any delay in performance caused by Force Majeure such as severe health impairments, weather-related disruptions, civil disturbances, transportation disruptions, or other causes over which the Affected Party does not have control. All parties agree to make their best efforts to find suitable alternatives and to respond as flexibly as possible to such events.

5. PAYMENT TERMS

Upon receipt of the agreed upon services, TJP will pay Survey Company Ltd. Survey Company Ltd. Should provide an invoice or PO to TJP Consulting.

6. CANCELLATION

In the event that either party is unable to fulfill its obligations under this Agreement due to Force Majeure beyond its control ("Affected Party"), it shall notify the other party ("Other Party") in writing as soon as possible and shall describe the constituent elements of the Force Majeure. Without limiting the generality of the foregoing, "Force Majeure" shall include severe health impairments, Coronavirus (COVID-19) related disruptions, legal strikes, civil disturbance, government authority orders, or any other causes of a similar nature or not over which the Affected Party does not have control. The term of obligations affected by Force Majeure shall be automatically extended by a period equal to the delay caused by the occurrence of this event, it being understood that this extension shall not impose any penalty upon the Affected Party. In every case, the Affected Party shall take, in agreement with the Other Party, all reasonable steps to ensure the normal resumption of performance of any obligation affected by the Force Majeure.

PLEASE SIGN A COPY OF THIS LETTER AND RETURN IT TO US.

Accepted on behalf of
SURVEY COMPANY LTD:

____
Signature: MF
Founder

Accepted on behalf of
TJP CONSULTING

____
Signature: PS
Project Manager