XYZ ORGANIZATION Code of Conduct Regulation
Training for Customer Service Ops

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Prepared by Diane Coradlo

High Level Design Recommendations for SOW

Objectives (From Source)

I. Treat all customers fairly, no matter their current retailer
II. Treat all retail competitors the same, including our sister companies
III. Keep all of our customer's information private
IV. Prevent an unfair competitive advantage for our sister companies
V. Describe how XYZ ORG Limited's business practices comply with the Code of Conduct Regulation
VI. Identify and report any instances of non-compliance

Recommendations for L2 eLearning

- Since this is an annual training, allow knowledgeable learners to test out
- To increase learner engagement, limit presentation time and focus seat time instead on a scored "activity" (actually a sneaky post-assessment) comprised of scenario-based questions*
- Create a bank of scenario-based questions that can serve up additional questions when a learner does not pass the first time. This bank can also be used for variation year to year.
    - 1-2 custom slide templates can be used to add richness to scenarios, for example by narrating an image-based introduction to the scenario before loading the full question text and answer choices.
- Tailor examples to XYZ and ABC audiences. For example, there may be two buttons or cards on the screen and the learner can choose the one relevant to them and skip the other. (Button triggers example content.)
    - Alternative — learner selects their organization from a drop down on the first slide, and they are only shown the examples that are relevant (no button click needed on later slides).
    - This option should be selected if post assessment questions need to be tailored to each audience.
- Offer counter-examples in addition to examples, to show learner what is both in scope and out of scope of regulations. "It **means** this," "It **does not mean** that"
- Data on actual errors or misconceptions (ie, previous training quiz results) would be helpful to guide which examples and scenarios to develop. Does [REDACTED] have job metrics, can they send a survey, or do they have previous training data?
- VoiceOver: 1 artist
- Custom infographics OR job aids: max of 1
- Music: none
- Feedback tones: none

*To avoid learner test anxiety, do not introduce assessment as such. Call it an activity and score it in the background. Reveal to learner at the end whether they passed the course or not. Ask them to re-take the "Course" not the "Assessment." Similarly, do not announce that there is a "Pre-Quiz" nor show pre-quiz result— this is also simply an activity, from the learner's perspective.

Comments on Anticipated Work Effort

- There seems to be a small gap in the source content - how to report non-compliance
- I recommend an analysis of what's truly need-to-know vs. nice-to-have
    - There seems to be an excess of nice-to-have information in the introduction, org structure, "what is the code of conduct?" and descriptions of the organizations that learners are a part of (XYZ, ABC)
    - This will require ~60 minutes with a SME
- A few scenarios have been provided in the source content, however about 3-4x this number of scenarios are recommended. Developing these is the bulk of the ID work effort.
    - This will require 4-6 hours of SME time.
    - The ID can keep the SME time on the lower end of that range by providing pointers on how the SME can outline scenarios for the ID to later flesh out.
- Need to check/test question bank functionality before proceeding full steam with ID and Dev work.

Learner Experience

<table>
<tr><td colspan="2">Step 1: Welcome & Pre-Quiz
Pre-Quiz Example: 1 Drag and Drop Activity
Stack of 10-12 draggable statements
True column, False column
Learner drags each statement to T or F column
To pass the pre-quiz, must drag all items correctly. While there should be no tricky items, they should be highly specific to this material and not easily guessed.</td></tr>
<tr><td>IF PASSED:</td><td>IF NOT PASSED:</td></tr>
<tr><td>Step 2 (Optional): Navigation unlocks. Learner may refresh on any course content as desired, or skip main course content and go straight to Step 3.

Menu/Topics:
I. Treat customers fairly
II. Treat retail competitors the same
III. Keep customer info private
IV. Preventing Unfair Competition
V. Business Practices
VI. How to Report</td><td>Step 2: Linear navigation through no more than 10 minutes of course content with a brief interaction (that makes the learner think) sometime between minute 4 and minute 6. See topics at left. Once a section has been completed, it can be revisited at any time (navigation unlocks).</td></tr>
<tr><td colspan="2">Step 3: Learner takes 10-question assessment. If assessment is not passed, it can be re-attempted. Learner will be prompted to review relevant course content and will be able to jump directly to the sections they need to fill the knowledge gap.</td></tr>
</table>

Alternative pre-quiz (fancy):

- 6 pre quiz questions, one for each learning objective
- For each question answered correctly, that section's navigation unlocks and the learner is able to skip it if desired
- Learner experience: emphasize the unlocked sections (a benefit to the learner), not the topics the learner got wrong

Preliminary Design
This design should be validated and adjusted after the project begins; it's intended use below is to provide a high level scope for the SOW.

Objective (Shortened)	Learning Points	Question Bank	Number of Questions in Bank	Question difficulty
I. Treat customers fairly	• Treat all customers equally • If asked about market choices, provide factual information • Make changes only w/ customer consent	A	6	2 easy, 3 medium, 1 hard
II. Treat retailers the same	• XYZ ORG cannot give preferential treatment to ABC ORG • Refer customers to [redacted] or the toll free phone number • Do not solicit business or speak on behalf of any particular retailer • Use the XYZ ORG transfer protocol when customer is interested; read fair competition statement • What to do if customer asks to be transferred to ABC ORG • What to do if customer called the wrong line of business	B	6	2 easy, 3 medium, 1 hard
III. Keep customer info private	• Why is confidentiality important? Job Security, Financial impacts on XYZ ORG • The kinds of customer information you are accountable for • Never provide a caller with info they don't already know • Exceptions and how to handle	C	6	2 easy, 3 medium, 1 hard
IV. Preventing Unfair Competition	• XYZ ORG cannot provide ABC ORG an unfair competitive advantage • XYZ ORG and ABC ORG cannot access each other's customer data	D	4	1 easy, 2 medium, 1 hard

Objective (Shortened)	Learning Points	Question Bank	Number of Questions in Bank	Question difficulty
V. Business Practices	• Obligations under Code of Conduct remain after you leave • Do not use or disclose any customer information • Same penalties apply	E	3	1 easy, 1 medium, 1 hard
VI. Reporting non compliance	• [gap]	F	2	1 medium, 1 hard
			27	**Total**

Preliminary Assessment Scoping:
Bank A — 2 questions
Bank B — 2 questions
Bank C — 2 questions
Bank D — 2 questions
Bank E — 1 question
Bank F — 1 question

Summary

The business case for using a question bank with extra questions is that the shelf life of the elearning will be much longer. In fact, with this number in the bank, by the time it *would* start to feel repetitive (year 3 or 4), most people will have forgotten at least some of the questions (the ones they haven't seen in 3-4 years). It also helps ensure a more effective learning experience the 1st time, because if the learner does not pass the assessment, they'll be served up a randomized second assessment wherein *many if not all* questions will be different.

Total Seat Time:

- ➡ Average learner: **22-25 minutes** (assumes they do entire course one time)
  - ➡ 2 min pre-quiz, 10 min course content, 10-13 min assessment
- ➡ Knowledgeable learner: **9-11 minutes** (assumes they skip all course content and test out)
  - ➡ 1-2 min pre-quiz, 8-10 min assessment
- ➡ Learner who takes post-assessment 2x: **35-38 minutes** plus any time between assessments to review course content. *Recommendation: this is a long seat time; we should lock course for 24 hours before learner can re-take.*
  - ➡ 2 min pre-quiz, 10 min course content, 23-26 min assessment

Breakdown:

- **Light analysis needed**
- **14 minutes of L1.5 elearning (includes 4 extra minutes for duplicated examples to accommodate multiple audiences)**
- **27 scenario based questions (L2) — equivalent of 27 minutes of seat time**
  - **Client has 8 in source materials**
  - **These are generally story based; medium and hard questions have increasing levels of complexity**

- **27 examples and counter examples**
    - **Client has 2 in source materials**
    - **These are generally short and to the point but may be story based**
- **1 jumbo pre quiz question — equivalent of 2 minutes of seat time**
    - **Alternative: one pre quiz question per learning objective; for every question answered right, that section's navigation unlocks**
- **Max of 1 job aid OR custom infographic**
- **Two options for accommodating multiple audiences**
    - **L3 ($$$): Drop down for learner to select who they work for (XYZ or ABC) which triggers:**
        - **Only relevant examples to display automatically**
        - **Only relevant question scenarios to be assessed**
    - **L2 ($$): Learner clicks button for XYZ or ABC to show only the example relevant to them**
        - **Question scenarios would have to be one size fits all**
        - **Proceed w caution — ie, does client really want to assess that ABC folks know what XYZ people would do in a scenario where a customer calls into XYZ?**