

SUPER SCOOT  
CUSTOMER  
SERVICE ENGLISH  
COURSE



SUPER  
SCOOT

# TABLE OF CONTENTS

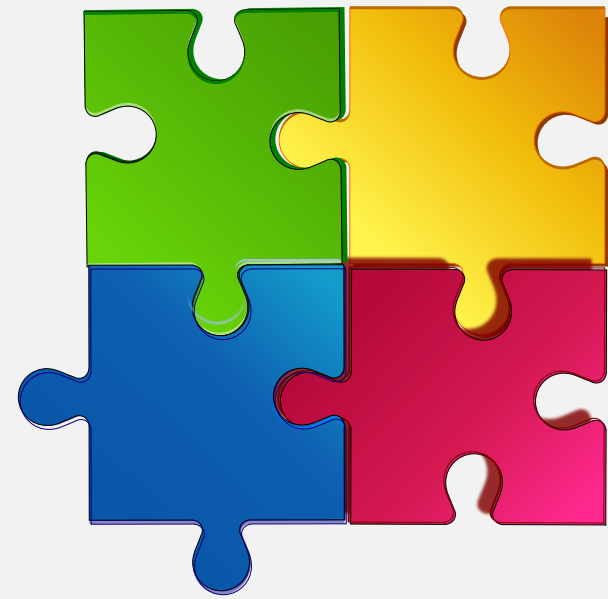
- Executive Summary..... 4
- Problem Statement..... 5
- Problems Identified by Stakeholders..... 6
- Opportunity..... 7
- Learning Goals & Objectives..... 8
- Learning Context..... 9
  - Establishing and validating instructional need..... 10
  - Establishing goals..... 13
  - Validating learning goals..... 15
  - Gap identification..... 16
  - Goal prioritization..... 18
- Learning Environment..... 26
  - Environmental analysis..... 26
  - Organization’s characteristics..... 29
  - Organization’s community..... 31
- Learner Analysis..... 33
  - Cognitive characteristics..... 33
    - General aptitude..... 34
    - Developmental level..... 36
    - Language..... 37
    - Reading level and literacy..... 38
  - Cognitive processing styles..... 39
  - Specific Prior knowledge..... 40
  - Physiological characteristics..... 41
  - Affective characteristics..... 42
  - Social characteristics..... 44

# TABLE OF CONTENTS

- Task Analysis..... 48
  - Learning goals..... 49
  - Learning outcomes..... 50
- Terminal Objective for Unit 1..... 51
- Terminal Objective for Unit 2..... 52
- Information Processing Analysis..... 53
- Prerequisite Analysis ..... 55
- Assessing Learning..... 61
- Assessment Instruments & Blueprints..... 64
  - Phrases and grammar..... 67
  - Product knowledge..... 71
  - Support/Resolution..... 73
- Assessment Blueprint..... 76
- Instructional Strategies..... 77
  - Macro-strategies..... 77
  - Micro-strategies..... 80
  - Micro-strategies graphs..... 80
    - Vocabulary..... 80
    - Phrases and grammar..... 81
    - Product knowledge..... 82
    - Support/Resolution..... 83
- Formative Evaluation Plan..... 100
  - Questions to be answered..... 101
  - Characteristics of materials..... 102
  - Learner characteristics..... 103
  - Procedures followed..... 104
  - Data gathered..... 105
  - Interpretations and revisions..... 107
- Bibliography..... 109

# EXECUTIVE SUMMARY

SuperScoot is a multinational, electric scooter start-up company that was founded 2 years ago, with its HQ in San Francisco. SuperScoot has introduced a new type of scooter that is available for purchase only and uses fingerprints to lock/unlock. SuperScoot hired 200 new customer support agents globally to cope with increasing support demand. SuperScoot decided to hire customer support agents in 3 different locations to address the increasing demand for support and opted for the most cost effective solutions when deciding which members to hire. When hiring, English was required, but it was not required as a first language. However, after an initial period of rapid growth and increasing sales, in the last six months, the customer base started to decrease and the company stakeholders started to receive negative feedback about the company's customer support. These new agents have been through the existing standard onboarding, but there is no additional training on product, or grammar or tone. Negative feedback has been given from customers on current agent's grammar, pronunciation and ability to effectively communicate, address concerns, and solve issues. Our Instructional Design team (made of 4 people) has been given the task to create an additional blended training program to address the performance gaps shown by the newly hired agents and eventually ensure that SuperScoot's customer base is highly satisfied with the support they receive going forward.



# PROBLEM STATEMENT

SuperScoot has neglected the importance of increasing their support agents' mastery of English due to the challenges of fast-growth and low budget as a successful start-up. The company is now experiencing problems with customer dissatisfaction due to the inability of support agents to properly understand and communicate. Customers have been giving negative feedback about the agents on surveys and product review sites stating the agents cannot understand their issue(s), did not resolve their issue(s), were rude or did not match their tone (used a happy tone or came across as unempathetic and short when when customers were angry, did not properly answer questions and gave advice that was hard to understand because of grammatical mistakes and lack of vocabulary. Customer retention dropped in Q4 of last year and Q1 of this year and discovered that customer dissatisfaction with our agents was contributing to customers switching companies.

# THE STAKEHOLDERS HAVE IDENTIFIED THE FOLLOWING PROBLEMS:

- 1) **Customers:** 85% of satisfaction surveys filled in the last quarter have an average unsatisfactory score of 45/100 and customers have expressed their negative feedback in the survey open-ended question. There is a 1.5 out of 5 star customer satisfaction rating on Google Review.
- 2) **Internal stakeholders in charge of Internal Quality Assessment:** A review of a random samples of the support agents' interactions or calls with customers showed that the average quality score is below the agreed target of 90%. The quality review was based on an established positive scoring framework that evaluated business and soft skill categories and assigned points to each category for a total sum of 200 points per interaction. If an agent has a miss in one of the categories, points were deducted. The agreed target of 90% means an average score of 90% (minimum 180 points) among all reviews performed in a set date range.
- 3) **Company stakeholders:** The leadership team (CEOs, and upper level managers) have reviewed customer retention rates and have noticed a drop in the past quarter. At the same time, the qualitative negative feedback from customers has reached them and they have decided to invest in an instructional design team to evaluate the need for more instruction.

# OPPORTUNITY

There is an opportunity to improve overall support performance so customer support agents improve their customer satisfaction score (to at least average) and can help the organization retain their current customer base. Because this audience consists of non-native English speaking support agents, they need to be able to better support English-speaking customers daily, particularly over the phone and through live chat. This opportunity includes helping the customer support agents gain the confidence and English expressions needed to resolve issues, with even the most difficult clients. Participants could improve the experience by learning common English expressions as well as common vocabulary and tips about intonation and stress to give their spoken English a more native sound when on the phone. There is also an opportunity for them to respond more quickly and with proper writing etiquette and tone when communicating via live chat.



# LEARNING GOALS

When presented with a customer issue over email or phone, non-native speaking customer service agents will be able to:

- Use proper vocabulary and tone to create a connection with customers
- Interpret and resolve customer issues effectively without escalation to supervisors due to language barriers.

# LEARNING OBJECTIVES

Learners will be able to:

- Identify and select appropriate words to construct sentences in English both on the phone and through email and chat.
- Ask probing questions to correctly interpret customer issues.
- Choose appropriate and suitable opening and closing greetings based on the customer's tone.
- Use accurate wording and tone to articulate responses for resolving customer issues.





# LEARNING CONTEXT



ESTABLISHING AND  
VALIDATING THE  
INSTRUCTIONAL NEED

# ESTABLISHING AND VALIDATING THE INSTRUCTIONAL NEED

The first stage in the needs assessment process is to identify and involve the stakeholders to the project. The stakeholders include those people who will be impacted or affected by the outcome(s) of the project. This project focuses on improving customer service agents' confidence and ease of use with English communication. Stakeholders include: customer service agents, managers, customers, and the business owner.

The relevance of each stakeholder could be conceptualized in concentric circles, with those closest to the center more directly impacted by the design and efficacy of the instruction. To identify relevant goals, management will be surveyed through a pre-questionnaire that determines their desired objectives for employees, interviews with current high performing employees with English as a second language who excel at using casual, polite, and accurate English in a customer service context.

The pre-program questionnaires will inform the evaluation of the instructional program, a core component of the instructional design according to the ADDIE process (Dousay, 2018). Learning goals emerge as the final step following the learning needs assessment in which instructional teams determine the outcomes, knowledge and skills learners should attain following instruction (Smith and Ragan, 2005).

# ESTABLISHING AND VALIDATING THE INSTRUCTIONAL NEED

The instructional team should process existing prerequisites among the target learning population through administering an initial survey. Without this critical step, instructional designers may miss the precise goal that should be met and risk creating an instruction that omits pre-knowledge to attain the prescribed learning goals. Through this analysis, however, the instructional design team can identify appropriately relevant learning goals, without making the biased assumption that learners are like the designers, with similar background knowledge or baseline (Smith and Ragan, 2005). This process also reveals a level of precision required to write learning goals, for example if the customer service agents know how to greet customers, but encounter difficulty providing troubleshooting instructions over the phone, we may realize their sentence order is strong, but they are weak in sequential numbering in the second language. Thus, the goal for instruction would be, for example, to “explain a five-step process in English”, rather than a more generic and less relevant goal such as “understand customer needs”. The course’s learning goals will be composed of several learning objectives for each smaller instructional unit that feeds up to the overall goal attainment for the course. Each subject matter expert for the smaller units will consider the learning objectives for their section and the design team will evaluate how the objectives contribute to the goals.

# ESTABLISHING AND VALIDATING THE INSTRUCTIONAL NEED

Interestingly, language training is unlike other subjects with a negative connotation for declarative knowledge (Smith and Ragan, 2005). In learning a language, one should be able to recall and understand per Bloom's taxonomy (1956). certain components to language, such as conjugations, vocabulary, tense, and other grammar rules. However, language training also requires intellectual processing ability to understand how to apply language rules to new contexts, infer meaning from context, as well as inferring meaning from tone. Relevant goals will need to be grouped into concepts, such as "resolving customer complaints", "providing product knowledge", "billing and account support", "troubleshooting", etc. By applying the learning logic of concepts to this training, customers will be able to relate certain English phrases, rules, and vocabulary to distinct concepts, or containers, (Smith and Ragan, 2005) for that area of knowledge.

# LEARNING CONTEXT



ESTABLISHING GOALS

# ESTABLISHING GOALS

After completing this training course, customer service agents should be proficient and comfortable in English to:

- Use phone greetings and colloquialisms with customers
- Explain product features
- Interpret and resolve customer issues with a polite service attitude
- Ask probing questions to address customer concerns without escalation



# VALIDATING LEARNING GOALS

Once the goals are identified, the instructional team will continue to analyze and revisit the goals to ensure the instruction stays relevant. The validation process is generally iterative (Smith and Ragan, 2005), so several rounds of feedback will continue to revise and form the goals to best meet the learners' needs. The instructional design team needs to break down the goal into its components through a task analysis that reveals the steps that must be taken for a learner to attain the desired goal (Smith and Ragan, 2005). That is, are the goals as stated at the appropriate level, and are there any prerequisites that must be completed prior to achieving the goal? If so, the listed goal needs to be revised to incorporate thorough instruction of the prerequisite material. Furthermore, the goals should be reviewed by an expert in the field with high familiarity with either the content of the instruction, the learners and their characteristics, or the learning environment (online tools, curriculum, faculty, etc). This level of expert review can validate the need for the goals as well as provide formative feedback to deepen or modify the goals as needed.

# GAP IDENTIFICATION

The current level of attainment of the goals in current performance levels is low, as seen in our Customer Satisfaction Score (CSAT) of 45 of 85% of surveys filled in the last quarter. There is also a 1.5 out of 5 star customer satisfaction rating on Google Review. The desired level of attainment would be to raise our score to 80 (Excellent) by the end of Q4 this year.

To measure improvements in our CSAT scores, we would use the following metrics:

- Overall Satisfaction Measure (Attitudinal)
  - Ex: Overall, how satisfied are you with our customer service experience on the phone?
- Loyalty Measurement (Affective, Behavioral)
  - Ex: Would you recommend our customer service experience to your family and friends?
  - Ex: Would you recommend our scooter service to your family and friends?
- Attribute Satisfaction Measurement (Affective and Cognitive)
  - Ex: How useful did you find your customer service experience?
- Intentions to Repurchase Measurements (Behavioral Measures)
  - Ex: Do you intend to consult our customer service agents if you have an issue in the next 30 days?
  - Ex: Would you use our scooter service again?



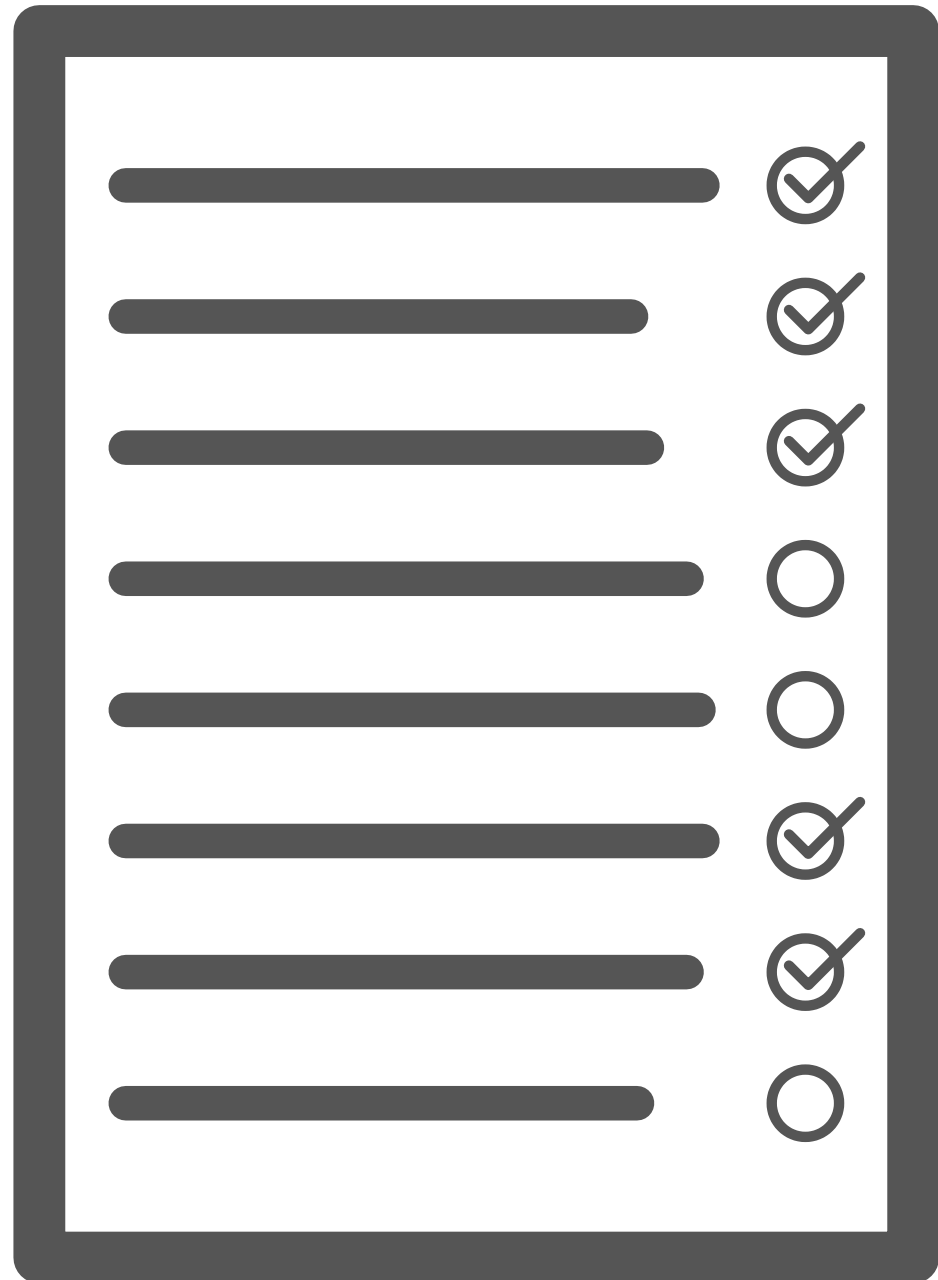
# GAP IDENTIFICATION

We would also conduct interviews with approximately 8 customer service agents to have them identify gaps in their knowledge that might be affecting their ability to assist customers. We would first approach the agents with the lowest customer service scores. It would be helpful to personally interview any willing customers to help improve our systems.

After responding to the survey online or via phone, customers could opt to be contacted by someone from our team about their experiences in resolving their issue. Finally, we would observe customer service agents to see how they interact while on calls with customers.

The desirable level of attainment of these goals would be to raise our CSAT score to 80 (Excellent) by the end of Q4 this year. This will be an indicator that customers are satisfied not only with our service, but the support system available for the service through our customer service agents. In order to reach this score, our agents will need to be trained in grammar, cultural nuances and customer service skills.

# LEARNING CONTEXT



GOAL PRIORITIZATION

## GOAL PRIORITIZATION

The instructional design team, together with the company stakeholders, should be involved in the prioritization of the unreached goals.

The company stakeholders include the top management at SuperScoot. They had been made aware that the low CSAT scores and negative qualitative feedback from customers in the past quarter might also have had an impact on lower customer retention rates. Other stakeholders include the Quality reviewers, who flagged poor performance average scores in the last 3 months and customers, who have been experiencing a poor customer support when reaching out to the Help team at SuperScoot to resolve their issue with the service.

The 'problem model' was useful to first assess the learning context and needs. The company already had an onboarding program for new customer support employees. However, the onboarding lacked practice sections and actual focus on advanced English. Additionally, even the product-related onboarding parts were designed with English speakers in mind, with complex words and colloquialisms that might not be easy to understand by a group of non-native speakers.

# GOAL PRIORITIZATION

Once the problem had been identified and shared by the company management, the hired ID team was responsible for assessing the need for an instruction to address poor performance. In particular, the IDs were in charge of the whole design process starting from the needs, context and learner analysis, to the strategy and tasks, to the implementation and formative evaluation.

First, the largest gap that the top management identified was a business one, related to lower customer retention rates and poor qualitative reviews affecting sales, therefore the ID team involved the different stakeholders in the goal prioritization exercise that took place over the course of one week. The unreached goals were prioritized based on their importance (critical tasks first) and on the consequences of not meeting those goals, assigning points over a grading scale (1: not relevant, to 5: highly relevant) to each goal based on the relevance to each set of criteria.

# GOAL PRIORITIZATION

Below are the unreached goals based on the above mentioned criteria:

- Agents understand customer issues clearly: this is the first step in every and each interaction and the starting point to be able to then resolve the customer issue and provide exceptional customer support. We assigned 4/5 points to this goal as agents can still clarify an issue in the following interactions if they didn't understand the issue clearly.
- Agents can appropriately address customer concerns without escalation to supervisors: this is the last critical step in the customer interaction and the one that has the largest business implications. After all, a customer support team is hired to provide support and resolve the customers' issues. Therefore, this goal was assigned 5/5 points.
- Agents know how to greet customers in a casual manner & Agents can use English colloquialisms with customers: these goals concern additional skills related to advanced knowledge of English. If agents possessed these skills, customer service wouldn't sound robotic and scripted and wouldn't include basic grammar mistakes that often make the advice unusable. This goal was assigned 3/5 points as advice could still be usable / issue resolved without using colloquialisms or casual greetings.

# GOAL PRIORITIZATION

Based on the above exercise, the goals were prioritized as follows:

- Agents understand customer issues clearly.
- Agents can appropriately address customer concerns without escalation to supervisors.
- Agents know how to greet customers in a casual manner & Agents can use English colloquialisms with customers.



## GOAL PRIORITIZATION

As surfaced during the needs assessment phase, a poorly designed self-serve onboarding program didn't include all the tasks and strategies to allow agents to develop the necessary advanced product knowledge and to reach the suitable level of English knowledge to support English-speaking customers that had troubles with the scooter service.

Also, there is no additional training after onboarding that focuses on upskilling more senior agents, so once a support team member is onboarded and goes through the self-serve materials, they don't have any opportunity to deepen their knowledge or their English skills except practicing with real customers. They also don't have any trainer that helps them with their gaps. Goal 1, 2, 3 are directly reachable via training, while goal 4 is a consequence of a carefully designed and successful training. Instruction/training is the fastest way to meet the first three goals, as the available tools and platforms that customer support agents are using do not allow for any in-product aid.

Additionally, soft skills like listening and attention to the customer, or language-related skills are to be taught via training since they would be better absorbed using instructional strategies like video, eLearning, simulation, facilitated practice & roleplay group exercises.

## GOAL PRIORITIZATION

As surfaced during the needs assessment phase, a poorly designed self-serve onboarding program didn't include all the tasks and strategies to allow agents to develop the necessary advanced product knowledge and to reach the suitable level of English knowledge to support English-speaking customers that had troubles with the scooter service.

Also, there is no additional training after onboarding that focuses on upskilling more senior agents, so once a support team member is onboarded and goes through the self-serve materials, they don't have any opportunity to deepen their knowledge or their English skills except practicing with real customers. They also don't have any trainer that helps them with their gaps. Goal 1, 2, 3 are directly reachable via training, while goal 4 is a consequence of a carefully designed and successful training. Instruction/training is the fastest way to meet the first three goals, as the available tools and platforms that customer support agents are using do not allow for any in-product aid.

Additionally, soft skills like listening and attention to the customer, or language-related skills are to be taught via training since they would be better absorbed using instructional strategies like video, eLearning, simulation, facilitated practice & roleplay group exercises.



# GOAL PRIORITIZATION

After the need assessment analysis, it was clear that there was a correlation between the agents' performance and the problem raised by stakeholders and management. Customer satisfaction surveys and qualitative feedback on the agent's achievements and performance showcased that the issue is related to a performance gap that can be addressed via training.

Clear learning goals can be identified and their achievement can be measured through training assessment. In this specific case, there are both 1) a problem (agents aren't performing well and it's impacting sales and reputation and 2) a consequent job task (customer care), so the two factors are correlated and training would help the ideal solution to address this performance gap.

In particular, we are talking about a learning focused on both the cognitive and the attitude domain, because the identified gaps are in knowledge (language) and behaviors (handling customer issues exceptionally).

# LEARNING ENVIRONMENT



ENVIRONMENTAL  
ANALYSIS

# ENVIRONMENTAL ANALYSIS

This training will be a blended approach. The ideal classroom-based instructor is a native English speaker and SME expert of the product who has been with the company for at least 8 years. In depth knowledge of the product, grammar and customer support etiquette is required. There is an existing onboarding that needed to be revamped, so this is the first of its kind at this organization.

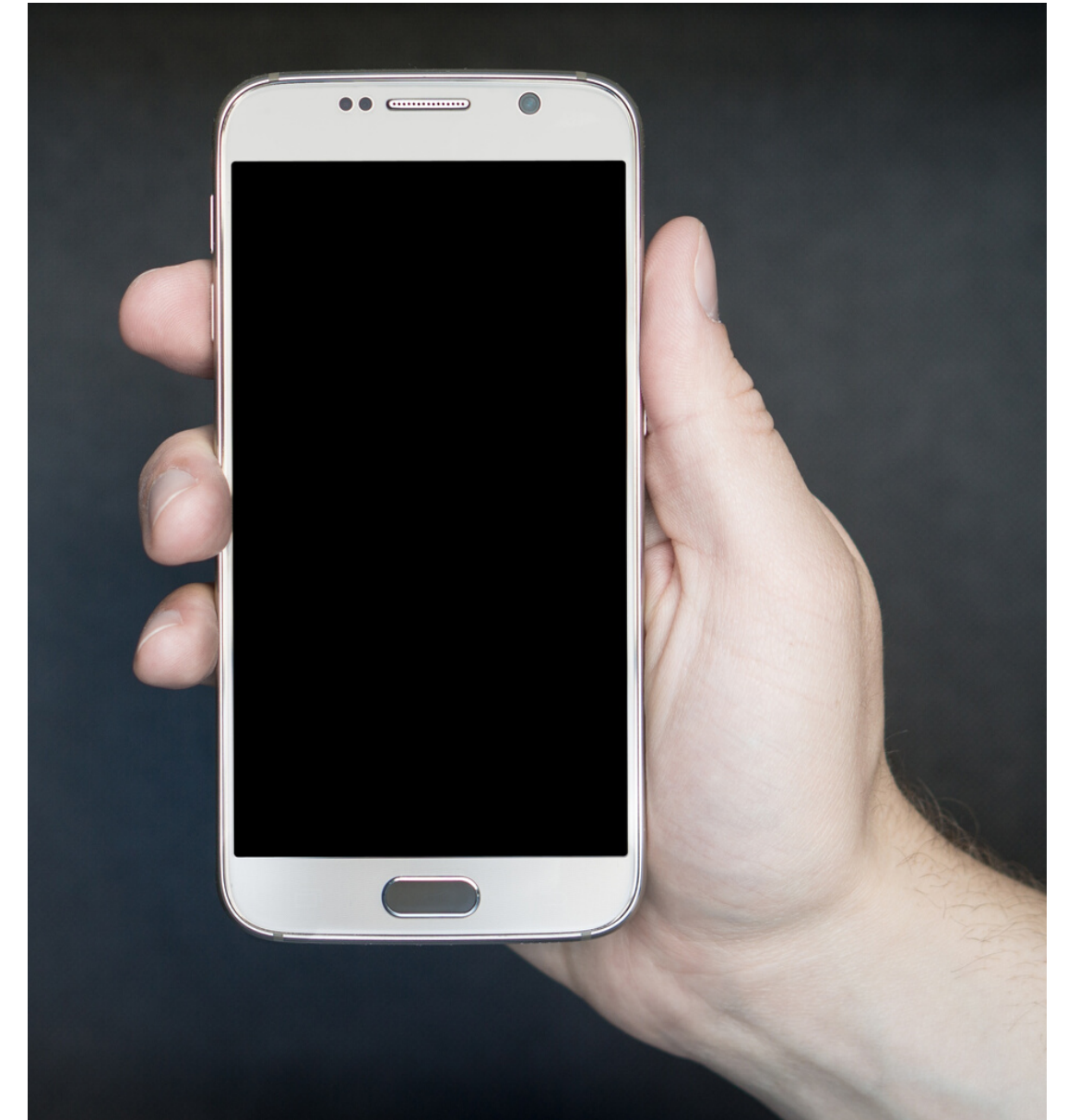
In terms of hardware and software, we have Articulate Rise as our eLearning authoring tool to create the online portion of the course which we will host via Absorb LMS. Both Rise and Absorb are intuitive and easy to use. Rise makes it easy to update course content. The Learners will be able to access the course via mobile device or computer as Rise and Absorb are both responsive/mobile friendly. This online portion of the course will serve as supplemental training and a reference guide for them to come back to for product knowledge refreshers.

We will need a classroom at the company's HQ and each regional office to lead the classroom-based training. The live instructor-led portion of the course will be facilitated in-person on a regular, recurring schedule at the San Francisco HQ location. Conference room availability seats up to 20 participants and can be organized in various configurations. The classroom must contain enough power outlets to supply power to student's laptops, access to the internet, and projection equipment. A Microsoft PowerPoint presentation will be projected on a screen with notes for facilitators. Learners will be placed at five tables to allow for small-group discussion with no more than four learners in each group. Participants will need access to paper or notebooks for note taking and a flipchart or whiteboard for activities.

# ENVIRONMENTAL ANALYSIS

The eLearning portion of the course will need to be mobile friendly and supported by both Mac/PC environments. It has been identified that each learner has access to at least one of these devices.

The webinar version of the online learning portion (for those needing to access outside of a live training facility) will take place online via the learner's computer/mobile device and the live sessions will be hosted by a native English speaker via Zoom. These webinar classes will serve as two things: 1) to support the in-person instruction with streamlined online lessons to supplement and 2) to be provided to those who may work entirely remotely (not in a regional office). The instructor of the webinars will need access to a quiet room to conduct them. The regional in-person training will require a classroom for each region with the characteristics described above.



# LEARNING ENVIRONMENT



CHARACTERISTICS OF  
THE ORGANIZATION  
IN WHICH THE  
LEARNING WILL TAKE  
PLACE

# ORGANIZATION CHARACTERISTICS

Due to a global workforce, the online portion will be hosted via LMS and live classes via Zoom. We will offer 2 time-zones (EMEAR and APJC) in order to have appropriate times for each participant. The responsibility for the selection of instructional materials is shared between the SMEs of product architecture, customer support managers, and the lead instructional designer. Recommendations for instructional materials may come from several sources: customers, leaders, and others as appropriate. The responsibility for designing and developing the instructional materials and maintaining brand standards and UX/UI quality rests with the professionally trained multimedia team (graphic designers and eLearning developers).



# LEARNING ENVIRONMENT



COMMUNITY IN WHICH  
THE ORGANIZATION  
RESIDES

# COMMUNITY IN WHICH THE ORGANIZATION RESIDES

We are a global company with our HQ in San Francisco. The company believes in a culture of inclusion and the value of diversity, so will pay special attention to avoiding the use of cultural and language stereotypes in the instruction. Since instructional designers tend to set their own preferences for learning theories based on their personal experiences, beliefs, values and the application, we will use a combination of theories and models tailored to the learners, their environment, and the material being delivered.





# LEARNER ANALYSIS



## COGNITIVE CHARACTERISTICS

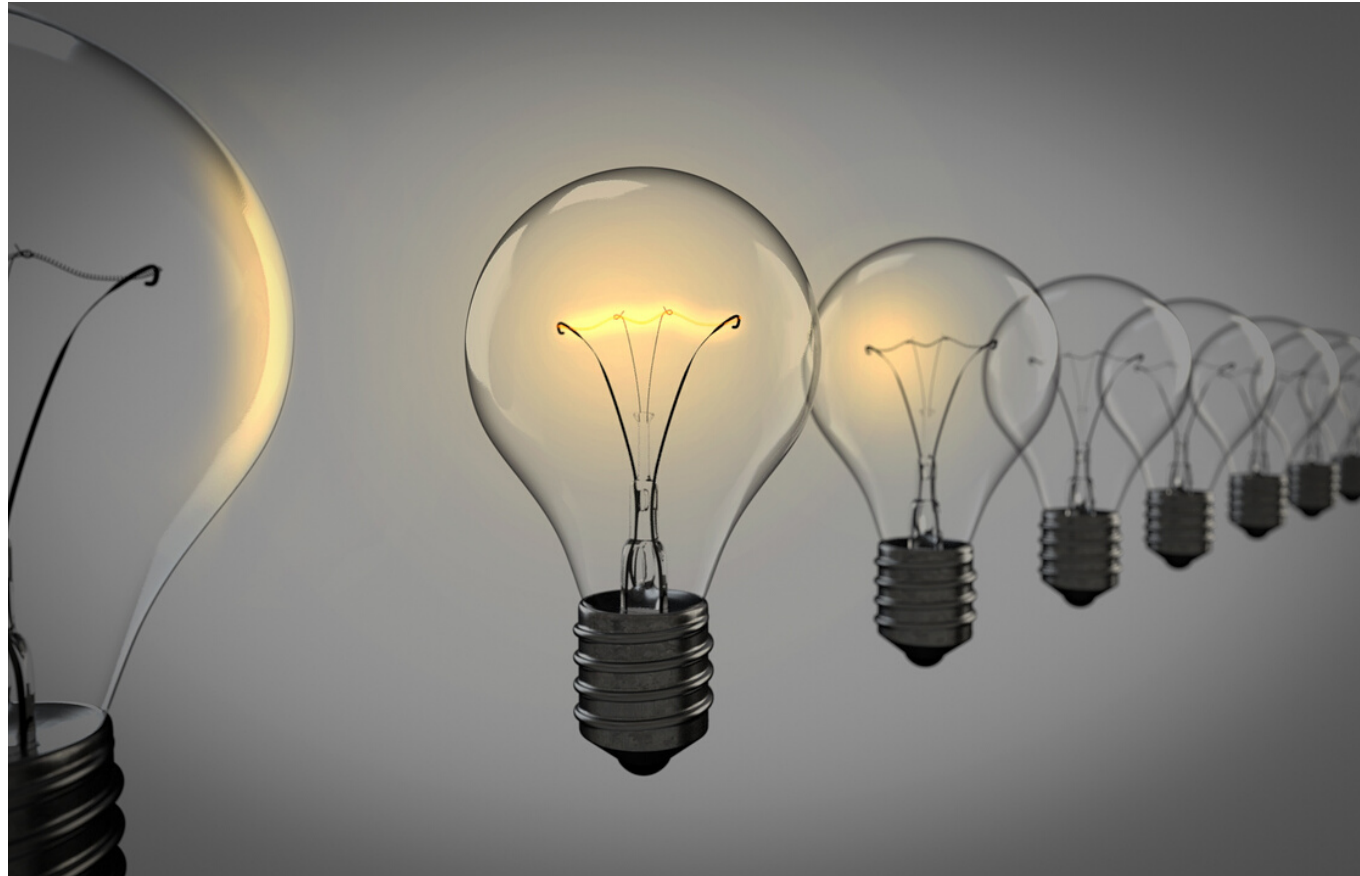
# GENERAL APTITUDE

All potential hires must take a Customer Service Aptitude Test in English, a psychometric tool that analyzes the most important traits that influence one's customer service aptitudes. The test consists of a random set of 48 multiple choice questions to measure:

- Sociability
- Self-confidence
- Tact and Diplomacy
- Cooperativeness
- Goal Orientation
- Patience
- Interpersonal Skills
- Grievance
- Handling Skills



# GENERAL APTITUDE



The test is scored on a 10 point scale. In order to pass, candidates must receive a score of 5 or higher. In addition to measuring overall performance, the final test report will give us insight about:

- Subject Analysis: Will allow us to identify gaps in the candidate's knowledge by analyzing his/her performance on each topic covered in the test.
- Subject Coverage: This section gives an overall view of the breadth of knowledge of the candidate.
- Percentile Analysis: Indicates how the candidate's performance matches up with that of the other people who have taken the same test before.
- Accuracy vs Speed analysis: Tells us the candidate's speed in relation to reading, comprehending and processing the information.
- General English skills in the context of customer service.

# DEVELOPMENTAL LEVEL

Piaget would classify our customer service agents as formal operational; they are all functioning adults who can use symbols to relate to abstract concepts and are able to make hypotheses and grasp abstract concepts and relationships. They have schema they use as building blocks to allow them to apply previous knowledge in the workplace.

## **Language development level**

To assess English proficiency, each potential candidate will take an online pre-employment English assessment to verify English levels. Candidates must receive a score of at least 75% to be considered for employment. Our company will use Krashen and Tracy's stages of second language acquisition to measure language development and to gauge the skills of each candidate.

# DEVELOPMENTAL LEVEL-LANGUAGE

Krashen and Terrell identified the following stages of Second Language Acquisition:

- Pre-production: minimal comprehension; does not verbalize
- Early production: limited comprehension; uses 1-2 word responses & phrases
- Speech Emergence: good comprehension; produces simple sentences
- Intermediate Fluency: excellent comprehension; makes few errors
- Advanced Fluency: near native levels of speech

The goal is to have each candidate reach at least Intermediate fluency by the end of our course.



# READING LEVEL & LITERACY



To pass the English proficiency exam, our employees have a reading level of Intermediate Fluency or Advanced Fluency (see classifications above).

They must be able to read and understand customer service complaints via chat and produce responses in the English language that are concise, grammatically correct and understandable.

## **Level of visual literacy, ability to gain information from graphics**

We also test potential employees' levels of visual literacy. To be hired, they must understand visual images on 3 different levels: literal, inferential and applied. This helps us determine how they will understand and interpret cultural nuances.

# COGNITIVE PROCESSING STYLES

Using Gregorc's Mind Styles Model, the majority of our customer service agents have Concrete Random perceptual abilities. We identified the following characteristics among the majority of our agents.

They:

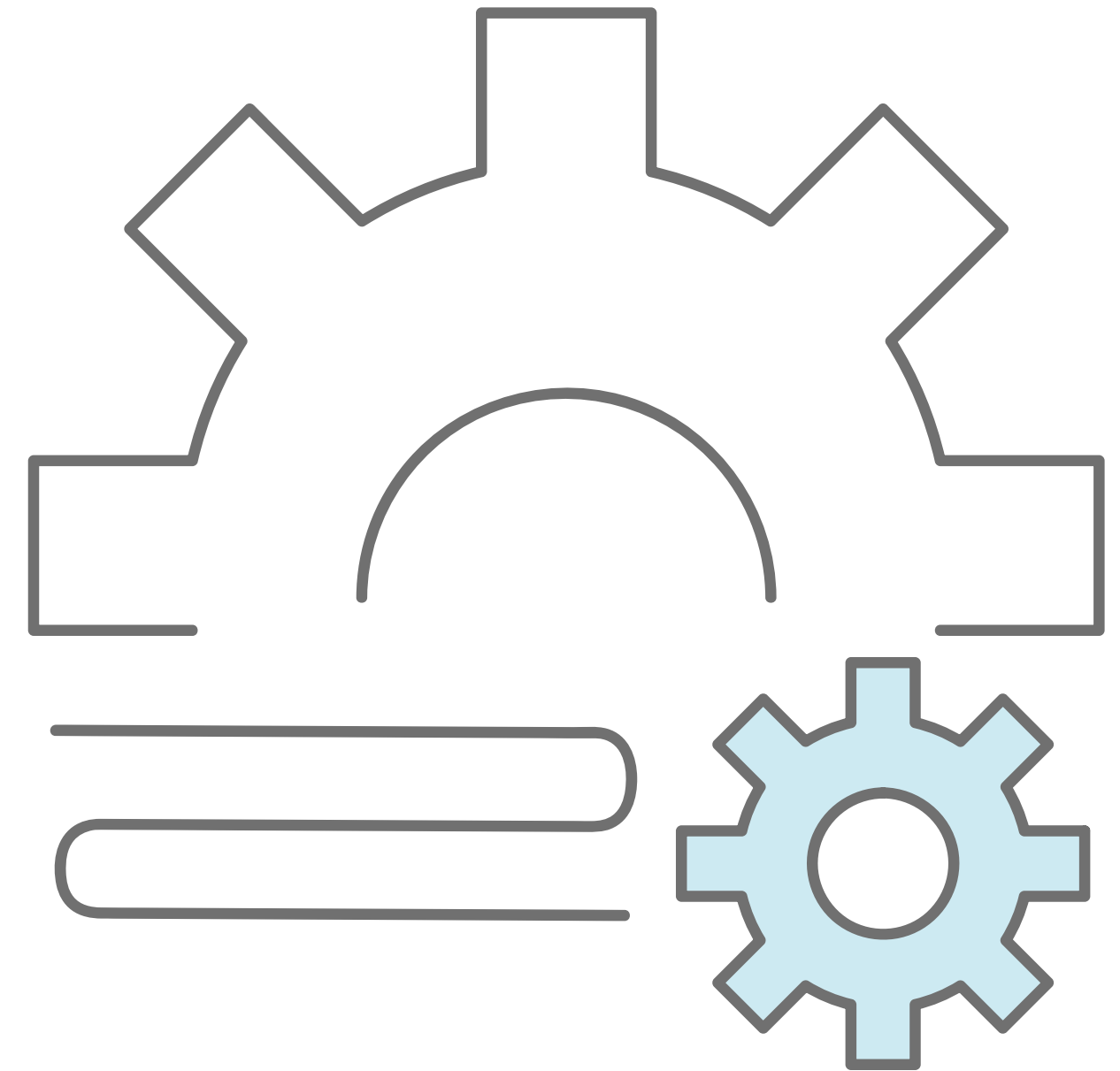
- Like experimenting to find answers
- Solve problems independently
- Take risks
- Use their intuition
- Do well with competition
- Cognitive and learning strategies
- We use many cognitive learning strategies in our current training (repetition, organizing new language, summarizing meaning, guessing meaning from context, using imagery for memorization etc.).

However, as previously mentioned, we will need to re-evaluate the effectiveness of our training program to boost our CSAT score.



# SPECIFIC PRIOR KNOWLEDGE

We like to hire individuals with prior experience as customer service agents. We test each candidate on his/her pre-existing knowledge, skills, beliefs, and attitudes, which influence how they attend, interpret and organize incoming information. However, something could be lost in translation between cultures, so we will examine how we can improve our measurement of this aspect.





# PHYSIOLOGICAL CHARACTERISTICS

## SENSORY PERCEPTION

For our training design, we will assume similarity among learners in terms of sensory perception. All support agents are able to benefit from the use of audio-visual systems, which will be essential in creating the e-learning portion and for the live classes.

## AGE

The support agents that have been hired by our company are on average around 33 years old. They are familiar with the use of technology and are able to use computer softwares in an advanced way.

# AFFECTIVE CHARACTERISTICS

## MOTIVATIONS TO LEARN

Our agents have high intrinsic motivation to learn, also supported by extrinsic factors like rewards. If they manage to consistently achieve a higher CSAT score on average in a month, they will be rewarded with internal recognition, promotion, peer coaching opportunities. This helps increase their motivation to learn and acquire/improve specific skills that would help them reach this objective.

## ATTITUDE TOWARD SUBJECT MATTER

They are curious individuals that are interested in working in the customer support space for an upcoming multinational tech company. Their attitude toward customer support for SuperScoot is, therefore, positive. As their motivation is both intrinsic and extrinsic, agents have developed a positive attitude also towards the training subject matter, which focuses on English customer care skills

# AFFECTIVE CHARACTERISTICS

## ANXIETY LEVEL

Customer agents have a higher anxiety level due to the fact that they are located far from the HQ and they are contracted employees. They also receive delayed information and instructions due to time zone differences. What's more, they perceive their job security to be at risk if their CSAT score is not above target on a regular basis.

## BELIEFS

Since the target learner audience (the support agents) are located in three different continents and are from a multitude of different countries, the Instructional Design team will avoid any examples in the training that might go against beliefs of specific countries (i.e. religion, nutrition...) and focus on generalized and universally valid references.

# SOCIAL CHARACTERISTICS

## RELATIONSHIP TO PEERS

The relationship to peers will vary by each participant. Since this is a global team, many employees haven't met many of their peers, while others may work with them directly or in the same office.



## FEELINGS TOWARD AUTHORITY

The learner's motivation for this learning is positive as they have expressed interest in improving their English skills. The learners have expressed they want a degree of autonomy or responsibility for their own learning so we want to enhance that autonomy by offering them choices about assignments and by encouraging them to take initiative for their own learning.

# SOCIAL CHARACTERISTICS

## TENDENCIES TOWARD COOPERATION OR COMPETITION

The learners are responsive to competition and enjoy a competitive challenge as they are concrete-random learners. There is a healthy level of cooperation among employees, but incentivizing their achievements to speak to their competitive tendencies will provide the intrinsic competition that encourages them to do better than past performance.

## MORAL DEVELOPMENT (E.G. KOHLBERG'S STAGES)

This varies based on the employee. Some employees will be at higher stages than others, but most will be in the conventional and pre-conventional stages. The employees newer to the organization may be at the pre-conventional level due to wanting to please their boss and perform work diligently during a probationary period. Those in the conventional stage of morality are those more comfortable working within the organization and with their co-workers and supervisors.

# SOCIAL CHARACTERISTICS

## SOCIO-ECONOMIC BACKGROUND

Our learners come from a diverse economic background rather than one specific background. We are a large global team spread out across many different countries and cultures and the company staffing profile reflects this diversity. The socio-economic status of most support agents is lower-middle class to middle class. Managers are middle-class to upper-middle class.

## RACIAL/ETHNIC BACKGROUND, AFFILIATIONS

Our learners are diverse and not from not specific backgrounds due to SuperScoot being a global company with teams spread out among many different countries.

## ROLE MODELS

Learners will be able to learn from others who have advanced English skills and customer support skills (management, peers).



# DESIGN IMPLICATIONS

It's important for the success of a training initiative to conduct a thorough assessment of employees' needs and readiness before launching in.

The characteristics we've identified for the learners in this training program indicate that they will need a hands-on instructional program that caters to their Concrete-Random learning style on Gregorc's Mind Styles Model. The instruction should thus implement learning activities that allow the learners to experiment with different language styles at their own pace.

These learners, due to their cognitive preference to learn through experimentation, will appreciate a training program that offers different customer service scenarios that requires the agent to problem-solve in a simulated call. Since we know from the prior aptitude tests that they are competent in written English, we will rely entirely on spoken language. We know the agents are competitive per Gregorc's model, and that they will respond well to extrinsic rewards such as badgification within our e-learning courses, and small rewards for top performers at in-person sessions.

We will also design the training for their sense of intrinsic motivation, offering bonus points and congratulations messages in the e-learning platform for agents who demonstrate continuous improvement. The instruction will also offer a robust peer-to-peer learning platform that allows global customer service agents to interact with one another, posing questions about relevant scenarios that their peers may have also experienced. This online community will form a knowledge repository that other agents can search to see if their questions have already been answered.



# TASK ANALYSIS



# TASK ANALYSIS

## LEARNING GOALS

When presented with a customer issue over email or phone, non-native speaking customer service agents will be able to:

- Use proper vocabulary, tone and phrases to handle customer complaints
- Use empathetic language to create a connection with customers
- Interpret customer issues and demonstrate a polite service attitude to handle those issues
- Demonstrate & communicate product/service knowledge to the customer using proper vocabulary and phrases
- Resolve issues effectively without escalation to supervisors due to language barriers



# TASK ANALYSIS

## LEARNING OUTCOMES

In the course, learners need to recall basic definitions and phrases related to customer issues and products and apply them to scenarios both inside and outside of the instruction. Once learners have acquired these skills, they will be able to apply them to effectively solve the problem.

Learning outcomes of this training include three domains of learning:

- Intellectual skills: Learning to discriminate between certain words and phrases that haven't been used before and knowing when to use them
- Verbal: Conveying the proper information to customers through use of correct language choice
- Attitudes: Change of tone and attitude toward customers, showing understanding and empathy.

# UNIT 1-LANGUAGE FOCUSED

## THE TERMINAL OBJECTIVE OF THE INSTRUCTION FOR UNIT 1:

When presented with a customer issue about our product, the support agents are able to select and use grammatically correct English words to first greet the customer and then resolve their issue, adjusting tone to the situation, so that the customer is satisfied with the support interaction (as demonstrated by a positive customer satisfaction survey).

When presented with a customer issue:

- The agent identifies and selects appropriate words to construct sentences in English and respond to the customer based on what they have acquired in the language modules.
- The agent chooses relevant colloquialisms and suitable greetings based on the customer's tone and issue (i.e. the agent prefers an empathic vocabulary when customer is highly dissatisfied with the service, the agent prefers a more formal tone when customer threatens legal action...)
- The agent selects the most accurate domain-specific wording to articulate their response and resolve the customer issue.

# UNIT 2-CUSTOMER SERVICE SPECIFIC

As part of the enabling objectives:

## Terminal objective of the instructions for Unit 2:

When presented with a customer issue, support agents are able to connect and reassure the customer, correctly interpret the issue, identify the root cause, own the resolution independently from A to Z and advise the customer on the next suitable steps to resolve it without escalating to supervisor (when not needed) and in less than 24 hours.

- The agent correctly understands and interprets the customer's issue
- The agent asks probing questions to help determine the root cause of the issue
- The agent understands the product complexities and has gone through all the available documentation & training materials on the product & service offered by the company
- The agent articulates the next steps to resolve the issue in a clear manner
- The agent reassures the customer that their issue is being taken care of
- The agent closes the loop and makes sure with the customer that the issue is resolved.

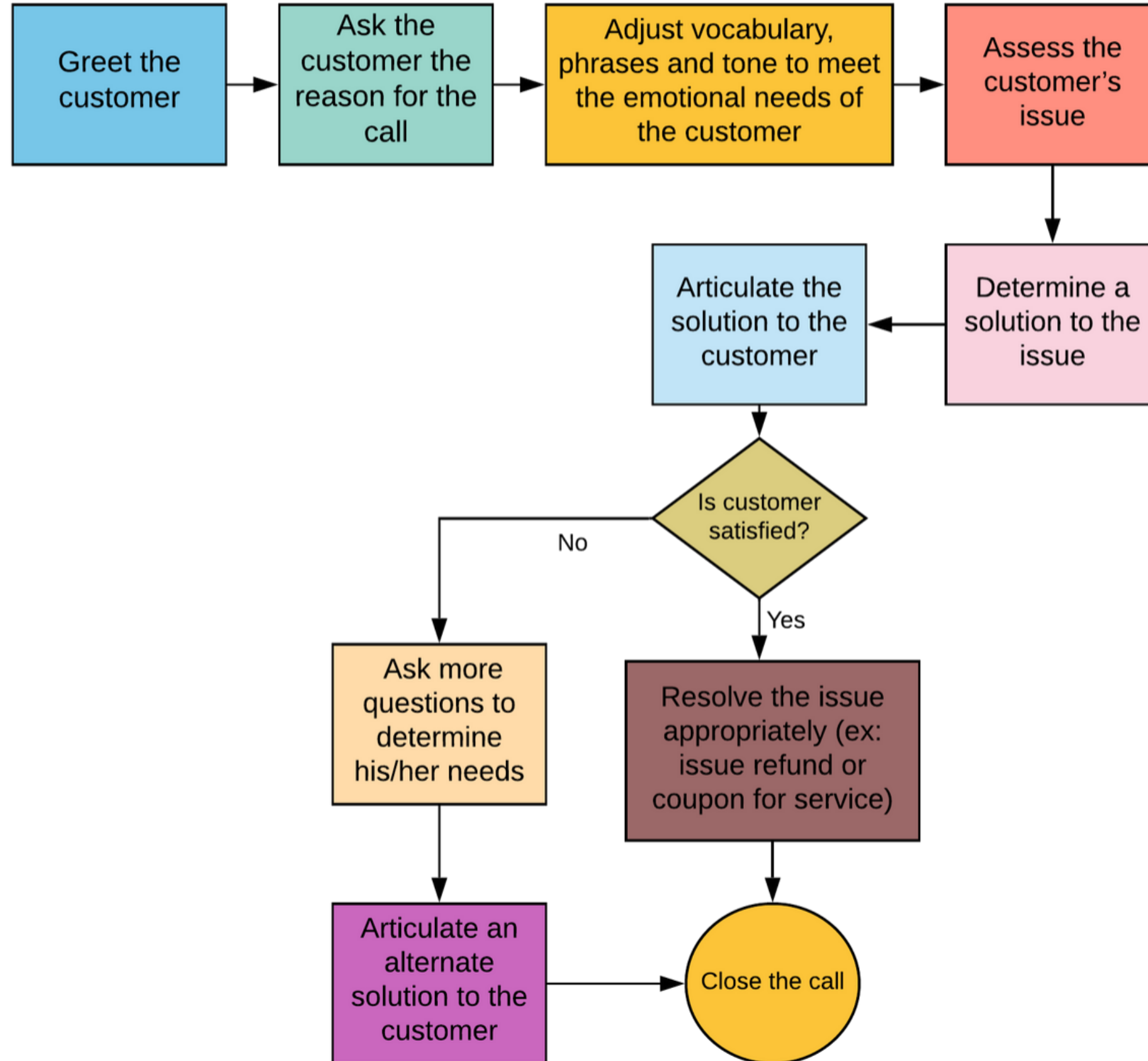
# INFORMATION PROCESSING ANALYSIS

The knowledge and skills that the learners must acquire to achieve the learning goals and objectives are broken down below:

Goal: Resolve communication problems effectively & politely, using proper vocabulary, tone and phrases without escalation.

1. Greet the customer
2. Ask the customer to explain the reason for the call
3. Adjust vocabulary, phrases and tone to meet the emotional needs of the customer
4. Assess the customer's issue
5. Determine a solution to the issue
6. Articulate the solution to the customer
7. If customer isn't satisfied, ask more questions to determine his/her needs
8. Articulate an alternate solution to the customer
9. Resolve the issue appropriately (ex: issue refund or coupon for service)
10. Close the call

# INFORMATION PROCESSING ANALYSIS



# PREREQUISITE ANALYSIS

HERE ARE THE PREREQUISITES FOR EACH STEP  
IN THE INFORMATION PROCESSING ANALYSIS:

## **Step 1: Greet the customer**

- Know how to use SuperScoot's phone system
- Know how to use the customer service portal for SuperScoot
- Know vocabulary and phrases to greet customers
- Know proper pronunciation to express vocabulary and phrases used to greet customers

## **Step 2: Ask the customer to explain the reason for the call**

- Know vocabulary and phrases to ask probing questions
- Know proper pronunciation to express vocabulary and phrases to ask probing questions
- Understand his/her role is to resolve issues brought up in customer calls

# PREREQUISITE ANALYSIS

HERE ARE THE PREREQUISITES FOR EACH  
STEP IN THE INFORMATION PROCESSING  
ANALYSIS:

## **Step 3: Adjust vocabulary, phrases and tone to meet the emotional needs of the customer**

- Listen carefully to customer's complaints and needs
- Understand how different tones reflect moods and frustration levels of customers
- Know vocabulary and phrases to reassure customer that his/her issue will be resolved

## **Step 4: Assess the customer's issue**

- Understand common customers' issues so he/she can understand the gravity of the situation
- Have problem solving skills
- Have critical thinking skills

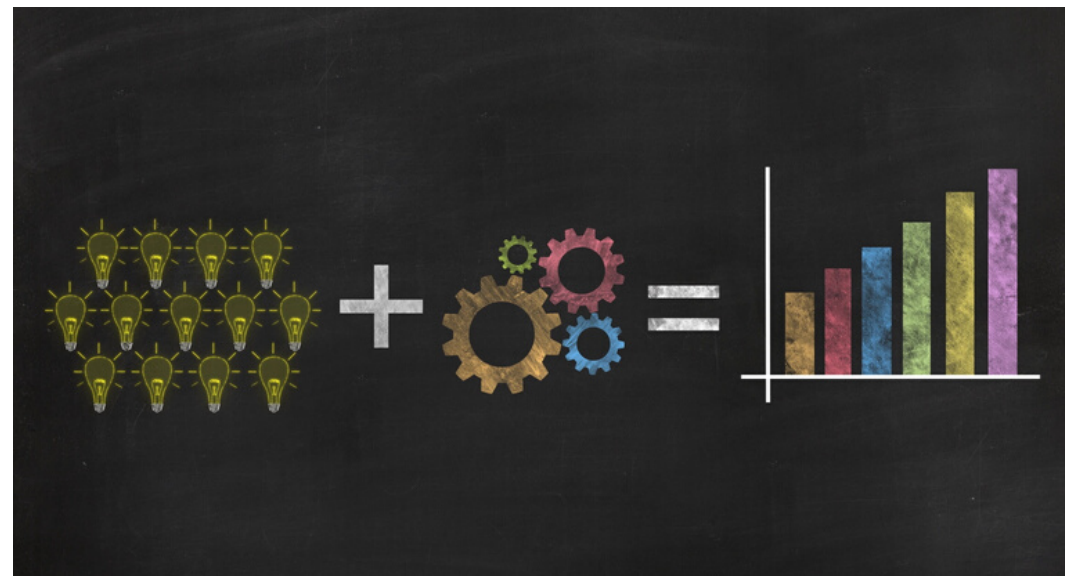


# PREREQUISITE ANALYSIS

HERE ARE THE PREREQUISITES FOR EACH STEP  
IN THE INFORMATION PROCESSING ANALYSIS:

## **Step 5: Determine a solution to the issue**

- Know practical solutions for common customer service complaints
- Know his/her authority to make decisions



## **Step 6: Articulate the solution to the customer**

- Know vocabulary and phrases to propose solutions
- Know proper pronunciation to express vocabulary and phrases to propose solutions

# PREREQUISITE ANALYSIS

HERE ARE THE PREREQUISITES FOR EACH  
STEP IN THE INFORMATION PROCESSING  
ANALYSIS:

## **Step 7: Resolve the issue appropriately (ex: issue refund or coupon for service)**

- Understand what appropriate resolutions are available for common customer service issues
- Use the computer system to document the resolution

## **Step 8: Close the call**

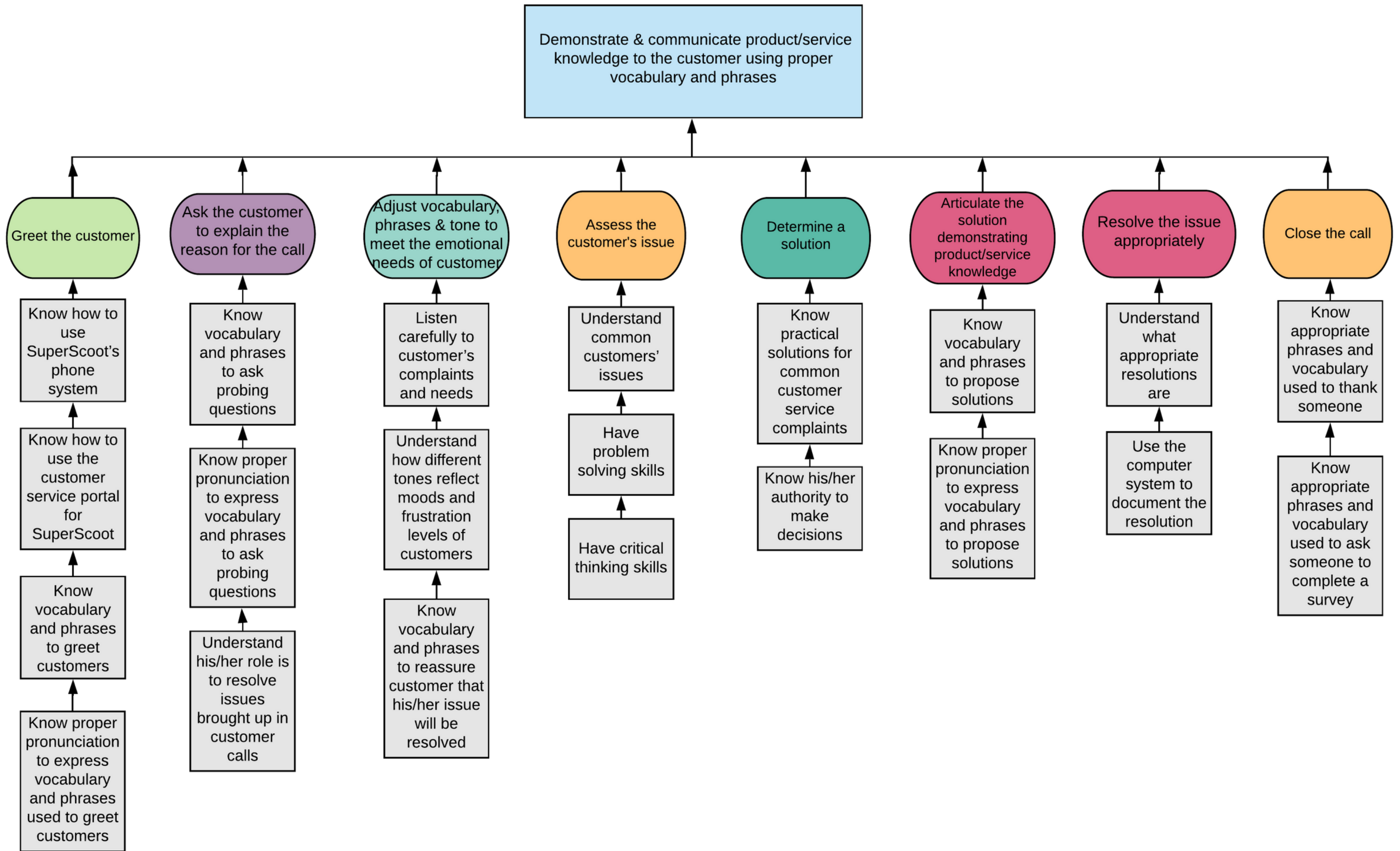
- Know appropriate phrases and vocabulary used to thank someone
- Know appropriate phrases and vocabulary used to ask someone to complete a survey

# PREREQUISITE ANALYSIS

## ENTRY BEHAVIORS

### **Entry behaviors:**

- Knowledge of basic English vocabulary, grammar and syntax
- Knowledge of common customer service issues
- Have the mindset that their goal is to resolve customer dissatisfaction by providing solutions in a polite manner using proper English
- Students should also have adequate product knowledge so instruction time can focus on language acquisition in this unit.
- Know how to answer and hang up the phone
- Know how to use headphones
- Know how to use a computer
  - Know how to use a mouse
  - Know how to use a keyboard
  - Know how to turn a computer on and off



# ASSESSING LEARNING



The purpose of our assessment is to determine the level of competence of our trainees to determine whether or not an individual has the customer service and English skills to begin handling customer complaints. It will also help us identify any learning gaps and measure the effectiveness of our course.

Our assessment must meet the criteria described by Smith and Ragan in *Assessing Learning from Instruction in Instructional Design*. That is, it must be valid, reliable and practical and be congruent, complete, consistent, confident, and cost effective (108).

# ASSESSING LEARNING

We will use a criterion-referenced model to develop our assessment to carefully define the scope of the skills and knowledge to be assessed. That means our objectives will help us guide our assessment.

By the end of the course, trainees must demonstrate:

- While handling a complaint, they are able to select and use grammatically correct English words to first greet the customer and then resolve their issue, adjusting tone to the situation, so that the customer is satisfied with the support interaction.
- They are able to correctly interpret the issue, identify the root cause, own the resolution independently from A to Z and advise the customer on the next suitable steps to resolve it.

There will be 2 units, each comprising 2 sub-units. Each sub-unit will have its own assessment. For final certification, the agents will be monitored for a week during customer service calls.

# ASSESSING LEARNING

## SUMMATIVE ASSESSMENTS WILL BE CONDUCTED IN TWO WAYS:

Formative assessments will be included throughout the training through scenarios/role-plays, small-group discussions, class discussions, and self-reflection. Facilitators will be trained to encourage participation and guide discussions toward the goals of this training.

### POST TEST

Learners will complete a post-test with multiple choice questions assessing the knowledge-based learning objectives. To achieve master, learners should score at least 80% on the post-test.

### PERFORMANCE CHECKLIST

The learners' supervisors will be provided with a checklist to be completed within 90-120 days of the instruction. This will assess the learner's mastery of the objectives.

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based. These assessment item specifications are shown below.

# ASSESSING LEARNING

VOCABULARY

<p><b>Objective:</b> Supply the objective to which these specifications apply</p>	<p><b>Terminal objective:</b> <i>When presented with a customer issue about our product, the support agents demonstrate the ability to understand, select and use appropriate English vocabulary to first greet the customer, listen to the complaint and then resolve the issue.</i></p>
<p><b>Description of Test Form:</b> Describe the form of assessments to be used for this objective.</p>	<p><b>Fill-in-the-blank</b> is a type of question or phrase with one or more words replaced with a blank line, giving the student the chance to add the missing word(s).</p> <p><b>The matching test</b> item format provides a way for learners to connect a word, sentence or phrase in one column to a corresponding word, sentence or phrase in a second column. The items in the first column are called premises and the answers in the second column are the responses.</p> <p><b>Oral assessment</b> refers to any assessment of student learning that is conducted by the spoken word. Students have to demonstrate that they possess the knowledge, skills, and abilities required by giving complete answers to the questions</p>

<p><b>Sample Item:</b> Provide a sample assessment item that is appropriate for this objective. Include directions for the item.</p>	<p><b>Example: Fill in the blank</b> <input type="text"/></p> <p>Fill in the blank with a word that best completes the sentence. <b>Options:</b> overcharged      broke down      batteries</p> <p>1)      <i>A customer called because her scooter _____ and she had to walk to her destination.</i></p> <p><i>The _____ weren't charged in any of the scooters at the pick-up point.</i></p> <p><i>I was _____ \$5 for a ride and I'd like a refund.</i></p> <p><b>Example: Matching</b> Match the word from the column on the right with its description in the column on the left</p> <p>1. <b>Issue</b> _____      2. <b>Account</b> _____</p> <p><i>a. the amount of information that identifies a user and allows a user to access a specific service.</i></p> <p><i>b. An important topic or problem for debate or discussion.</i></p>
--	--



# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based. These assessment item specifications are shown below.

## VOCABULARY

### Example: Listening Comprehension

Ex: True or False: You should ask the customer to complete the survey at the beginning of the call

### Example: Oral exam

Please describe what each vocabulary word means in a complete sentence. After defining, please use the word in an example sentence.

Describe what a \_\_\_\_\_ is.

*Describe what a complaint is.*

*"The customer filed a complaint about the defective product".*

<p><b>Question Characteristics:</b> Describe any relevant characteristics of the question or assessment situation to be provided. These characteristics will delimit and describe the tasks that are appropriate for this objective.</p>	<p>The mini quizzes given each day must be short, so they don't take up valuable lesson time. Matching, multiple choice or fill-in-the-blank formats would be effective. Feedback can be immediate. Students can grade other students' work or students can grade their own work to know what they need to work on.</p> <p>On the exam, the multiple choice, fill-in-the-blank and oral exam sections will be longer in order to encompass all the material covered in the unit.</p>
<p><b>Response Characteristics:</b> Describe any relevant characteristics, of the responses or activities of learners who engage in this assessment.</p>	<p>Responses must demonstrate the students can identify, understand and produce proper vocabulary words in order to resolve customer service issues. As mentioned before, this can be achieved through a number of assessment formats.</p>

# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based. These assessment item specifications are shown below.

VOCABULARY

<p><b>Question Characteristics:</b> Describe any relevant characteristics of the question or assessment situation to be provided. These characteristics will delimit and describe the tasks that are appropriate for this objective.</p>	<p>The mini quizzes given each day must be short, so they don't take up valuable lesson time. Matching, multiple choice or fill-in-the-blank formats would be effective. Feedback can be immediate. Students can grade other students' work or students can grade their own work to know what they need to work on.</p> <p>On the exam, the multiple choice, fill-in-the-blank and oral exam sections will be longer in order to encompass all the material covered in the unit.</p>
<p><b>Response Characteristics:</b> Describe any relevant characteristics, of the responses or activities of learners who engage in this assessment.</p>	<p>Responses must demonstrate the students can identify, understand and produce proper vocabulary words in order to resolve customer service issues. As mentioned before, this can be achieved through a number of assessment formats.</p>

<p><b>Objective:</b> Supply the objective to which these specifications apply</p>	<p><b>Terminal objective:</b> When presented with a customer issue about our product, the support agents are able to understand the customer, then select and use grammatically correct English words and phrases to first greet the customer and then resolve their issue, adjusting tone to the situation, so that the customer is satisfied with the support interaction.</p>
<p><b>Description of Test Form:</b> Describe the form of assessments to be used for this objective.</p>	<p>Assessments will be both formal and informal and include comprehension questions, writing summaries, in-class practice discussions with the instructor and peers, and graded tests. These assessments will take the form of:</p> <p><b>Multiple choice</b> questions to have the learner display correct grammar and phrases learned by selecting the best response option for certain customer support situations.</p> <p><b>Matching test</b> to have learners connect a sentence or phrase in one column to a corresponding sentence or phrase in a second column. The items in the first column are called premises and the answers in the second column are the responses.</p> <p><b>Oral assessment</b> will assess the student's learning of the spoken word. Students have to demonstrate that they possess the knowledge, skills, and abilities required by giving complete answers to the questions. Ex: The facilitator simulates situations between client and customer to see how the learner responds. This can simulate a live setting or a situation over the phone.</p>

# ASSESSING LEARNING

**Sample Item:**

Provide a sample assessment item that is appropriate for this objective.  
Include directions for the item.

**Multiple choice example:**

Case Study with multiple choice: A customer is calling with an issue. At the start of the call, you need to greet them and get some important information.

Instructions: Select the best way to ask this customer for their information.

- a. *Could I just have your first and last name, please?*
- b. *Give me your first and last name.*
- c. *I need your phone number.*
- d. *Can I have your full name?*

**Oral Exam Example:**

Instructions: Role play with another peer or instructor:

In groups of three, one is an observer, one is a customer, and one is the service representative. The customer and representative act out various scenarios. The observer offers feedback in terms of how well the representative communicated with his/her customer. The roles are rotated.

Example scenario: Customer complains the product is defective. The representative has to convince the customer it isn't.

\*The role-play above can also serve as a written role-play for chat-based customer support.

# ASSESSING LEARNING

# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based.

These assessment item specifications are shown below.

PHRASES/GRAMMAR

<p><b>Question Characteristics:</b> Describe any relevant characteristics of the question or assessment situation to be provided. These characteristics will delimit and describe the tasks that are appropriate for this objective.</p>	<p>For formative assessment - The mini quizzes given each day are meant to be informal so they must be short, so they don't take up lesson time. Matching, multiple choice or fill-in-the-blank formats would be effective. Feedback can be immediate. Students can grade other students' work or students can grade their own work to know what they need to work on.</p> <p>For summative assessment - we would use the above mentioned formats. The assessments would provide students with the opportunities to demonstrate what they know and challenge them to transfer what they've learned to specific and real-life tasks.</p>
--	---

# ASSESSING LEARNING

<p><b>Response Characteristics:</b> <input type="checkbox"/></p> <p>Describe any relevant characteristics, of the responses or activities of learners who engage in this assessment.</p>	<p>Responses must demonstrate the students can identify, understand and produce proper phrases to resolve customer service issues, while showing empathy, using proper grammar, tone, vocabulary and pronunciation. As mentioned before, this can be achieved through a number of assessment formats.</p> <p>A number of correct responses will be constructed with a checklist that has a list of features present in the learner's response.</p> <p>Fill-in-the-blank, multiple choice or essay formats would be effective. Feedback can be immediate. Students can grade other students' work or students can grade their own work to know what they need to work on.</p>
<p><b>Number of Items:</b></p> <p>Prescribe the number of items of the sort described which will be needed to assess learning of this objective.</p>	<p><b>Multiple choice:</b> 15 items</p> <p><b>Matching:</b> 15</p> <p><b>Fill in the blank:</b> 5 items</p> <p><b>Essay/Short Answer:</b> 5 items</p> <p><b>Oral exam:</b> 5 items</p>
<p><b>Mastery Criteria:</b></p> <p>Describe, preferably in quantitative terms, how well a learner must perform in order to reflect mastery of this learning objective.</p>	<p>Students should receive a grade of 80% or higher on the summative exam in order to reflect mastery of this learning objective. They should receive 90% on the listening comprehension and 95% on the oral exam.</p>

# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based. These assessment item specifications are shown below.

## PRODUCT KNOWLEDGE

<p><b>Objective:</b> Supply the objective to which these specifications apply</p>	<p>Terminal objective: Customer service agents will be able to provide appropriate customer support regarding the company's product when faced with a customer support inquiry. Agent will be able to describe, assess, and resolve the customer's issue with the product within an appropriate period for a customer service interaction.</p>
<p><b>Description of Test Form:</b> Describe the form of assessments to be used for this objective.</p>	<p>As this will be the first sub-unit in the product knowledge unit of the training course, an entry skills assessment will be given to gauge the agents' current product knowledge, recall ability, and understanding of product features. This will provide an accurate picture of where the agents need additional support so the instructor does not make incorrect assumptions regarding baseline knowledge (Smith and Ragan, 107).</p> <p>Criterion-referenced formative assessments will be given frequently throughout the course to help instructors determine where there are persistent gaps in knowledge and where additional remediation is required (Smith and Ragan, 105).</p> <p>Ex: students will be presented with a short quiz that tests their knowledge on the product's features at the end of each class. Example: Complete the instructions for unlocking a scooter reservation</p> <ol style="list-style-type: none"> <li>1. Open the HRDScooter App</li> <li>2. Select your current trip</li> <li>3. _____</li> <li>4. Start your ride</li> </ol>
<p><b>Sample Item:</b> Provide a sample assessment item that is appropriate for this objective. Include directions for the item.</p>	<p>Example: Complete the instructions for unlocking a scooter reservation</p> <ol style="list-style-type: none"> <li>1. Open the HRDScooter App</li> <li>2. Select your current trip</li> <li>3. _____</li> <li>4. Start your ride</li> </ol>

# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based.

These assessment item specifications are shown below.

## PRODUCT KNOWLEDGE

<p><b>Question Characteristics:</b> Describe any relevant characteristics of the question or assessment situation to be provided. These characteristics will delimit and describe the tasks that are appropriate for this objective.</p>	<p>The entry skills assessment will need to be given at the outset of the course, so the instructor knows what enabling objectives the learners have already met (Smith and Ragan, 107) so they can design appropriate instruction. This assessment should not be overly cumbersome or discourage learners from continuing on, so it may utilize skip-logic that will advance or terminate the assessment based on learner's performance. The short quizzes administered at the end of each class will be short and straightforward. The format will rely on fill-in-the-blank and matching questions that require agents to complete a description of a product feature, or match a diagram to the corresponding part.</p>
<p><b>Response Characteristics:</b> Describe any relevant characteristics of the responses or activities of learners who engage in this assessment.</p>	<p>Learners' responses should clearly demonstrate their familiarity with product features, ability to provide instructions to customers with product questions, ability to identify common issues with the product. Due to the nature of the unit, learners will be required to pass assessments at 100% to demonstrate full competency with the product knowledge.</p>
<p><b>Number of Items:</b> Prescribe the number of items of the sort described which will be needed to assess learning of this objective.</p>	<p>There will be one entry skills assessment and one quiz administered at the end of each class session; 4 in total. Learners will be allowed to retake the quizzes as many times as needed to gain total familiarity. Learners will not be penalized for multiple attempts, and the highest score will be accepted.</p>
<p><b>Mastery Criteria:</b> Describe, preferably in quantitative terms, how well a learner must perform in order to reflect mastery of this learning objective.</p>	<p>Knowledge of each product feature will be assessed: steering, safety, and app usage. There will be multiple quizzes given throughout the class until learners can correctly identify 100% of the product parts and can instruct customers on how to use the product, as well as responding to customer questions.</p>



# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based. These assessment item specifications are shown below.

SUPPORT/RESOLUTION

<p><b>Objective:</b> Supply the objective to which these specifications apply</p>	<p>Agents demonstrate the ability to fully understand the customer's issue, connect with the customer and provide all possible steps to resolve it or appropriate workarounds / next steps if the issue cannot be resolved. Agent reassures the customers that the support team has done everything to resolve the issue and uses a suitable tone to match the customer's.</p>
<p><b>Description of Test Form:</b> Describe the form of assessments to be used for this objective.</p>	<p>The assessment for this objective will consist of a pre-assessment and a post-assessment.</p> <p>With the pre-assessment, we wish to assess what level of knowledge the learner already possesses in terms of handling a customer with a problem. The pre-assessment will be authentic and in order to be anchored in a real scenario, it will be in the form of an observation of on-the-job performance, therefore of a support call.</p> <p>With the post-assessment, we aim at measuring the effectiveness of the learning after the specific support-related training has been carried out. The post-assessment will be in the form of a simulation in a group setting.</p> <p>The agents will be provided with a customer's problem and asked to proceed as usual to resolve it. The goal is to analyze the use of appropriate and correct actions / behaviours to provide exceptional customer support and resolve the customer's issue.</p> <p>For both assessments, evaluation will be performed by a designated facilitator (a lead) that will observe the agents during the call and the groups during the simulations and will assess the objective achievement using a checklist.</p>
<p><b>Sample Item:</b> Provide a sample assessment item that is appropriate for this objective. Include directions for the item.</p>	<p>After listening to the customer's initial concern, proceed to respond using the best practices related to support (including Listening &amp; Connecting, Ownership, Tone and Resolution). Continue the interaction until resolution is provided.</p>

# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based.

These assessment item specifications are shown below.

SUPPORT/RESOLUTION

<p><b>Question Characteristics:</b> Describe any relevant characteristics of the question or assessment situation to be provided. These characteristics will delimit and describe the tasks that are appropriate for this objective.</p>	<p>Question for the observational pre-assessment is rather simple, as we will ask agents to proceed to handle a customer's conversation as they would normally do.</p> <p>For the post-assessment, since the form is simulation, the question will focus on showcasing the appropriate behaviours and following the right actions to bring the interaction to a resolution.</p> <p>Some question characteristics include:</p> <ul style="list-style-type: none"> <li>• Act as natural as possible and ask follow-up questions in case you don't understand the customer's issue.</li> <li>• If you think you could have phrased your answer better, take the time to apologize with the customer and rephrase your thoughts.</li> <li>• Showcase empathy skills and attitude to handle problematic customers through your words.</li> </ul>
<p><b>Response Characteristics:</b> Describe any relevant characteristics, of the responses or activities of learners who engage in this assessment.</p>	<p>For both assessments, responses will be in the form of behaviors and actions. Agents will need to showcase the skills acquired in the support best practices section of the training, such as empathy, appropriate tone and voice, patience, rephrasing and summarizing...</p> <p>Example of response characteristics for the Listening skills section: The agent identifies and/or seeks out opportunities to connect and build rapport, and seizes those moments to build connections with the customer:</p> <ul style="list-style-type: none"> <li>• Agent demonstrates understanding of customer's questions/needs and/or situation.</li> <li>• Customers don't have to repeat information that they have already provided.</li> <li>• Agent provides answers that directly correspond to the customer's questions rather than giving them uncustomized information.</li> </ul>
<p><b>Number of Items:</b> Prescribe the number of items of the sort described which will be needed to assess learning of this objective.</p>	<p>Both the pre-assessment and the post-assessment will consist of one exercise where multiple actions and behaviors will be assessed and evaluated.</p> <p>For the Listening objective, the simulation will be focused on 3 items, the Ownership part will have 2 items, Issue Resolution will have 4 items. Agents will be able to retake the post-assessment twice after obtaining explanatory feedback from the facilitator.</p>

# ASSESSING LEARNING

Assessment instruments and blueprints will show learning objectives as either knowledge-based or performance-based. These assessment item specifications are shown below.

SUPPORT/RESOLUTION

<p><b>Mastery Criteria:</b> Describe, preferably in quantitative terms, how well a learner must perform in order to reflect mastery of this learning objective.</p>	<p>Both assessments will rely on a checklist of prerequisite actions and behaviours that the agent must demonstrate when observed on a real-life call.</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• Did the agent greet the customer at the beginning of the interaction? Yes / No</li><li>• Did the agent understand the issue and asked clarifying questions if not? Yes / No</li><li>• Did the agent use a suitable tone to match the customer's?</li><li>• Appropriate / Inappropriate (i.e. use of an excessively informal/friendly tone when customer expressed anger)</li><li>• Did the agent resolve the customer's issue?</li></ul> <p>Grading scale from 1 to 4 (did not resolve any of the issues, resolved the secondary issue only, resolved the main issue only, resolved all of the issues).</p> <p>Agents will be considered to have reached 'mastery' level once they can pass the post-assessment with a score of 90% or higher.</p> <p>There will be explanatory feedback shared by the facilitators so that agents can understand what they could improve.</p>
---	--

## Assessment Blueprint

The criterion level is defined below for each assessment instrument overall.

	Form	# of items	Criterion Level	Proportion
When presented with a customer issue about our product, the support agents demonstrate the ability to understand, select and use appropriate English vocabulary to first greet the customer, listen to the complaint and then resolve the issue	-Matching -Fill-in-the-blank -Listening comprehension -Oral (short answer, 1-on-1 with instructor)	29	85%	.20
When presented with a customer issue about our product, the support agents are able to understand the customer, then select and use grammatically correct English words and phrases to first greet the customer and then resolve their issue, adjusting tone to the situation, so that the customer is satisfied with the interaction (as demonstrated by the positive customer survey score)	-MC -T/F -Fill-in-the-blank -Essay/Short Answer -Oral (role-play /scenarios)	45	85%	.20
Customer service agents will be able to provide appropriate customer support regarding the company's product when faced with a customer support inquiry. Agents will be able to describe, assess, and resolve the customer's issue with the product within an appropriate period for a customer service interaction.	-MC -Matching -Fill-in-the-blank -Short answer	35	90%	.30
Agents demonstrate the ability to fully understand the customer's issue, connect with the customer and provide all possible steps to resolve it or appropriate workarounds / next steps if the issue cannot be resolved. Agent reassures the customers that the support team has done everything to resolve the issue and uses a suitable tone to match the customer's.	Simulation Listening Comprehension	13	90%	.30

# INSTRUCTIONAL STRATEGIES

## MACRO-STRATEGIES

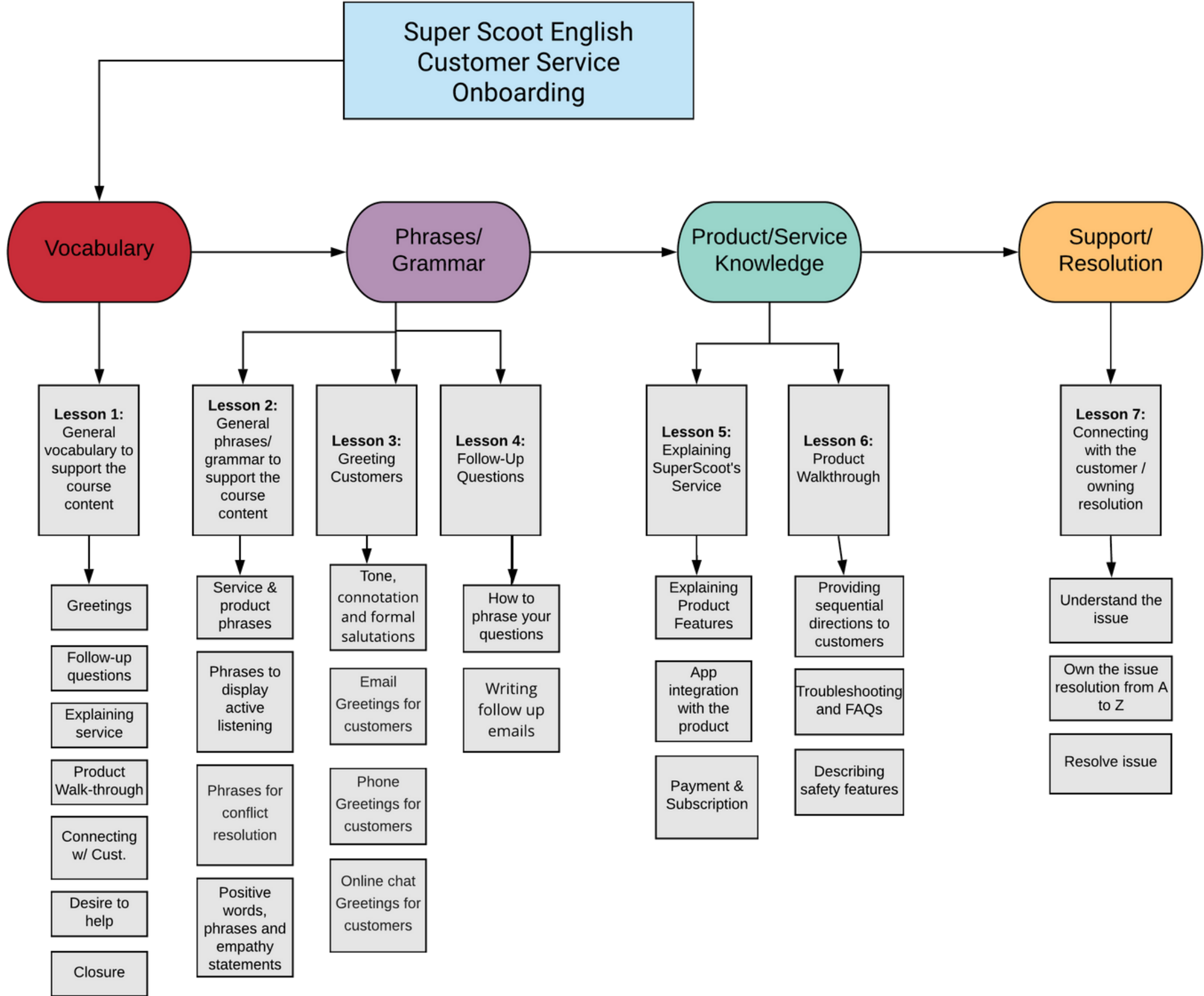


At a macro-level, SuperScoot’s English Customer Service Training uses a Concept-Related Structure, which is based on the idea that transfer occurs at the conceptual level of understanding. To illustrate moving curriculum and instruction from the lower cognitive levels (facts, skills) to a level of transferable understanding (generalizations), our program introduces vocabulary to support the course content. Then individual units (Vocabulary, Phrases/Grammar, Product/Service Knowledge & Support/Resolution) teach more specific concepts associated with our customer service training goals. Every unit uses the same framework to reinforce mastery of the concepts and subsequent application with employees.

# COURSE INTRODUCTION STRATEGY- INTRODUCTION TO SUPERSCOOT'S ENGLISH CUSTOMER SERVICE

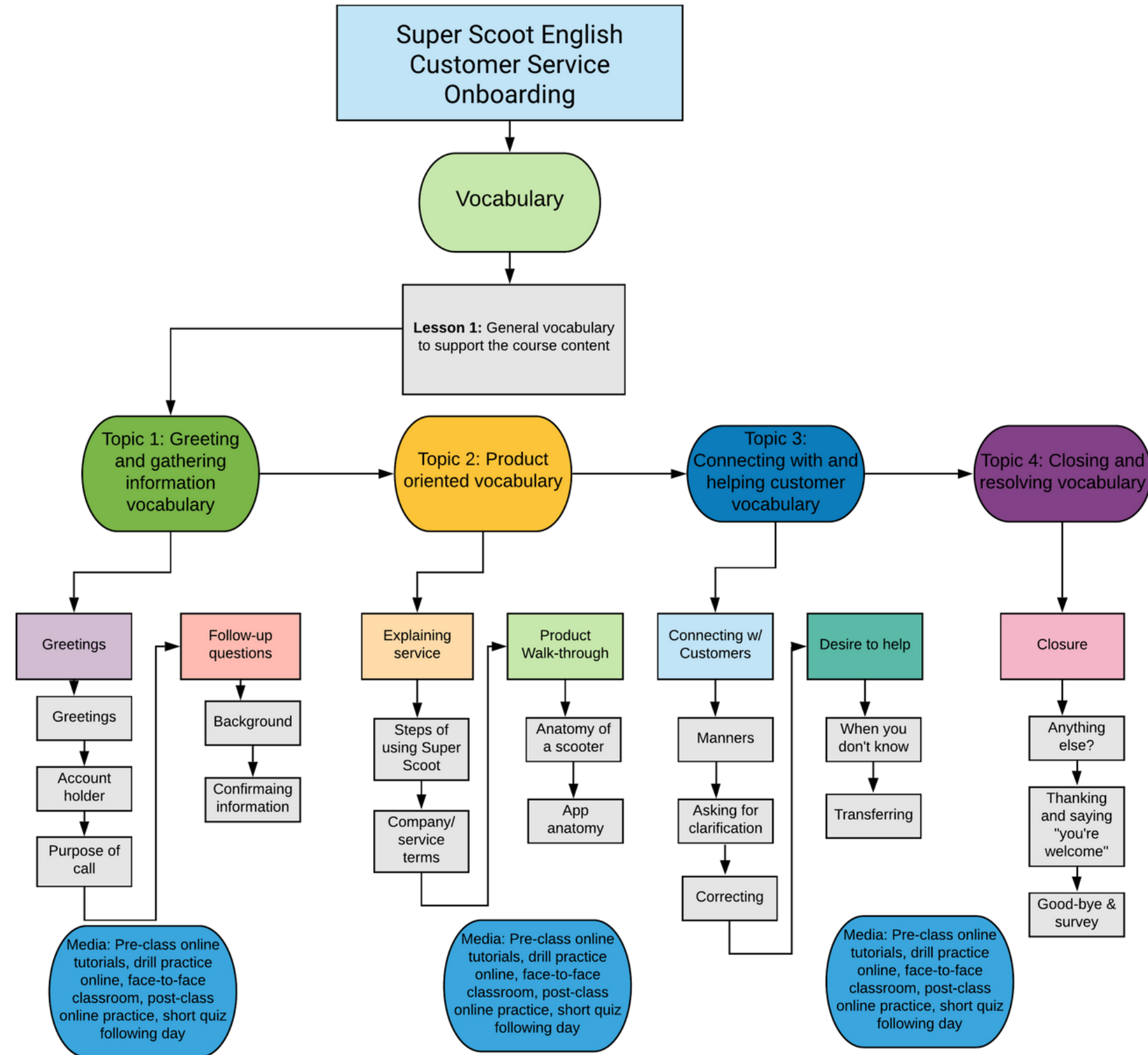
Deploy attention to lesson	After displaying introductory slides introducing facilitators and session logistics, the instructor displays slides with attention-grabbing vocabulary words that reflect feelings about customer service experiences and asks learners, "How do these words represent how some customers feel about their customer service experience?" Instructor accepts and acknowledges all learner responses and draws parallel between the words and new agent experience.
Establish Instructional Purpose	Instructor shares slides to describe the course's learning goals.
Arouse Interest and Motivation	Instructors integrate discussion from attention-grabbing vocabulary words and the importance of customer service experience using the actions from units 1-4 to set learners down the right path.
Preview Lesson	Instructor presents slide that shows a preview of the workshop, describing an overview of each unit, common elements in each unit (self-reflection and action plan), and the post-session assessment activities
Process Information	Instructor: <ul style="list-style-type: none"> <li>•Introduces the goals of the course and the needs of SuperScoot's stakeholders.</li> <li>•Provides the benefits of proper customer service onboarding and its impacts to the organization and employees.</li> </ul>
Body (Units 1-4)	Provides brief transition to subsequent units. See individual units below

# MACRO-STRATEGIES



# MICRO-STRATEGIES

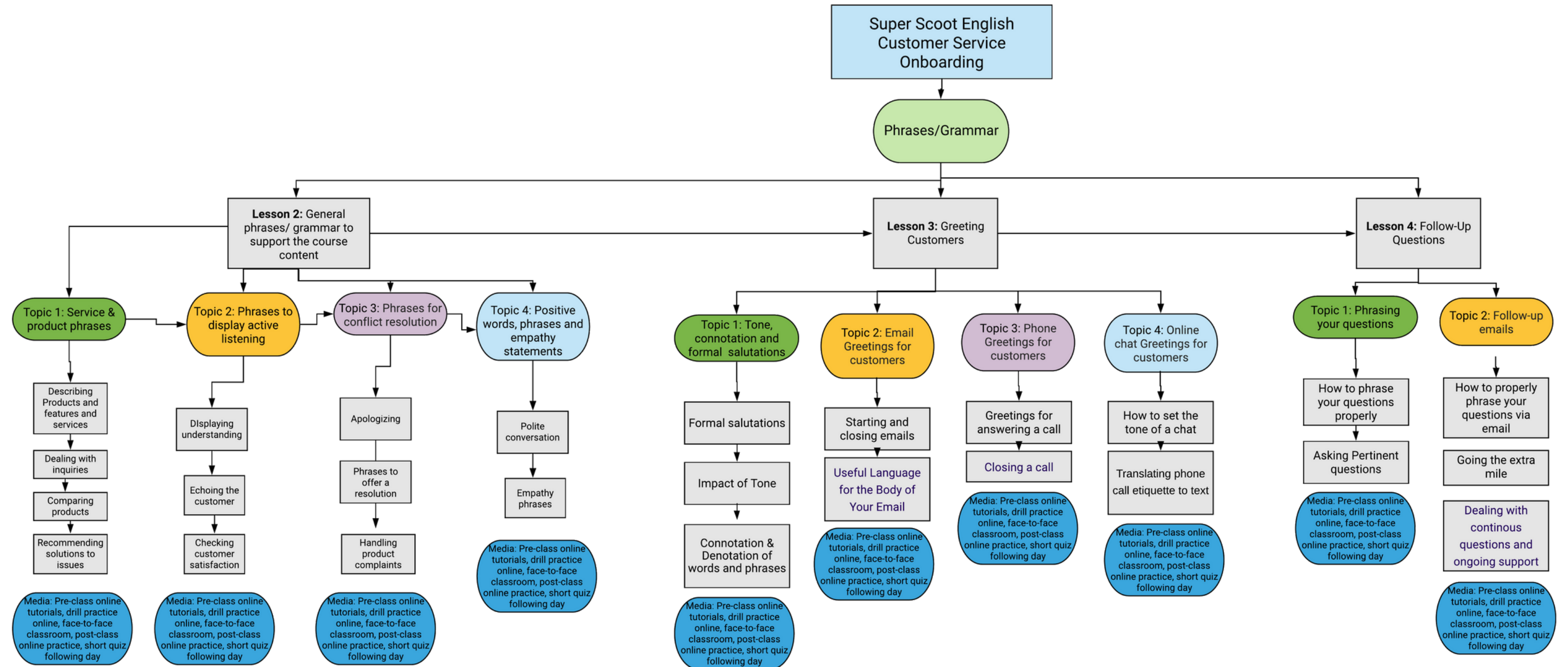
## VOCABULARY





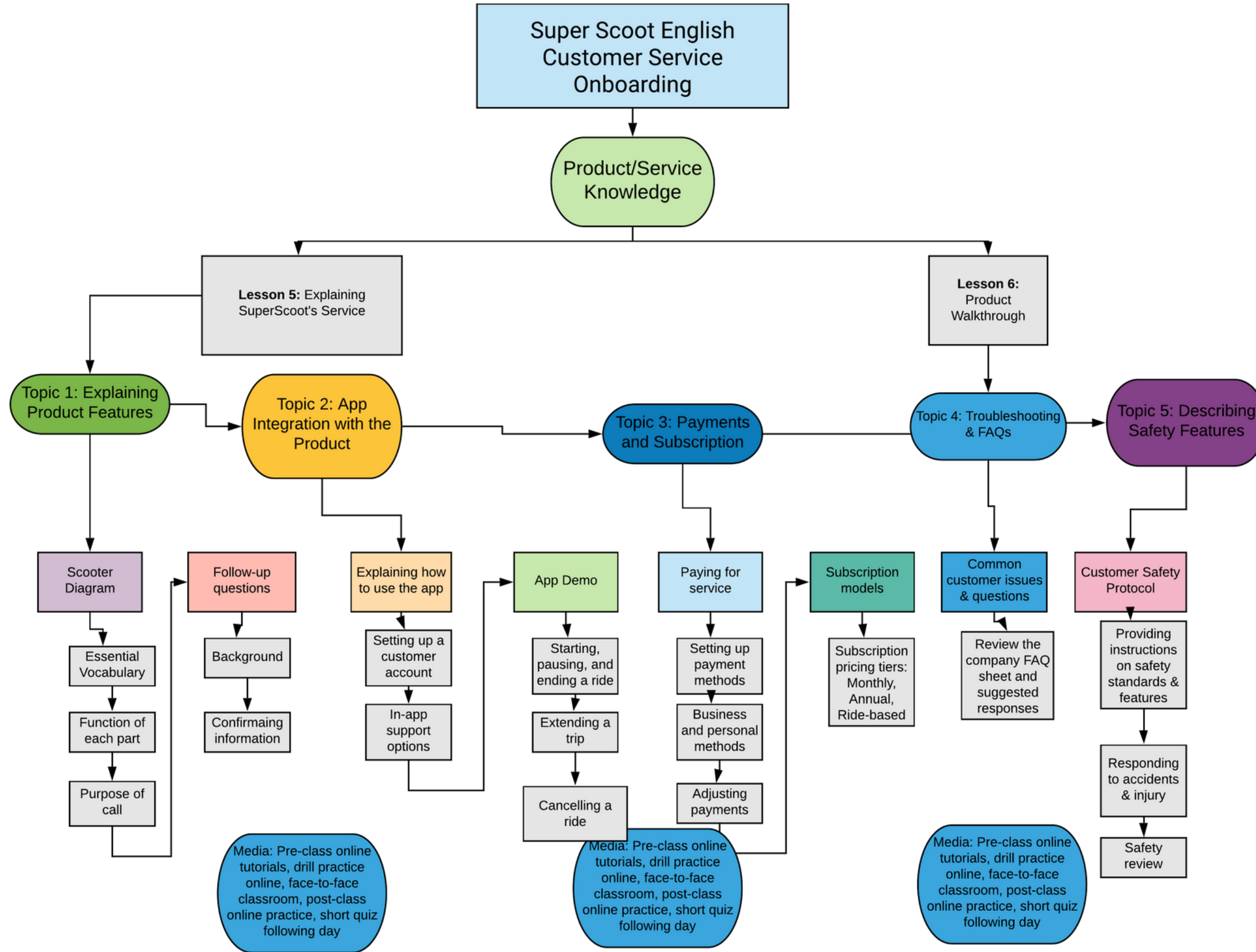
# MICRO-STRATEGIES

## PHRASES/GRAMMAR



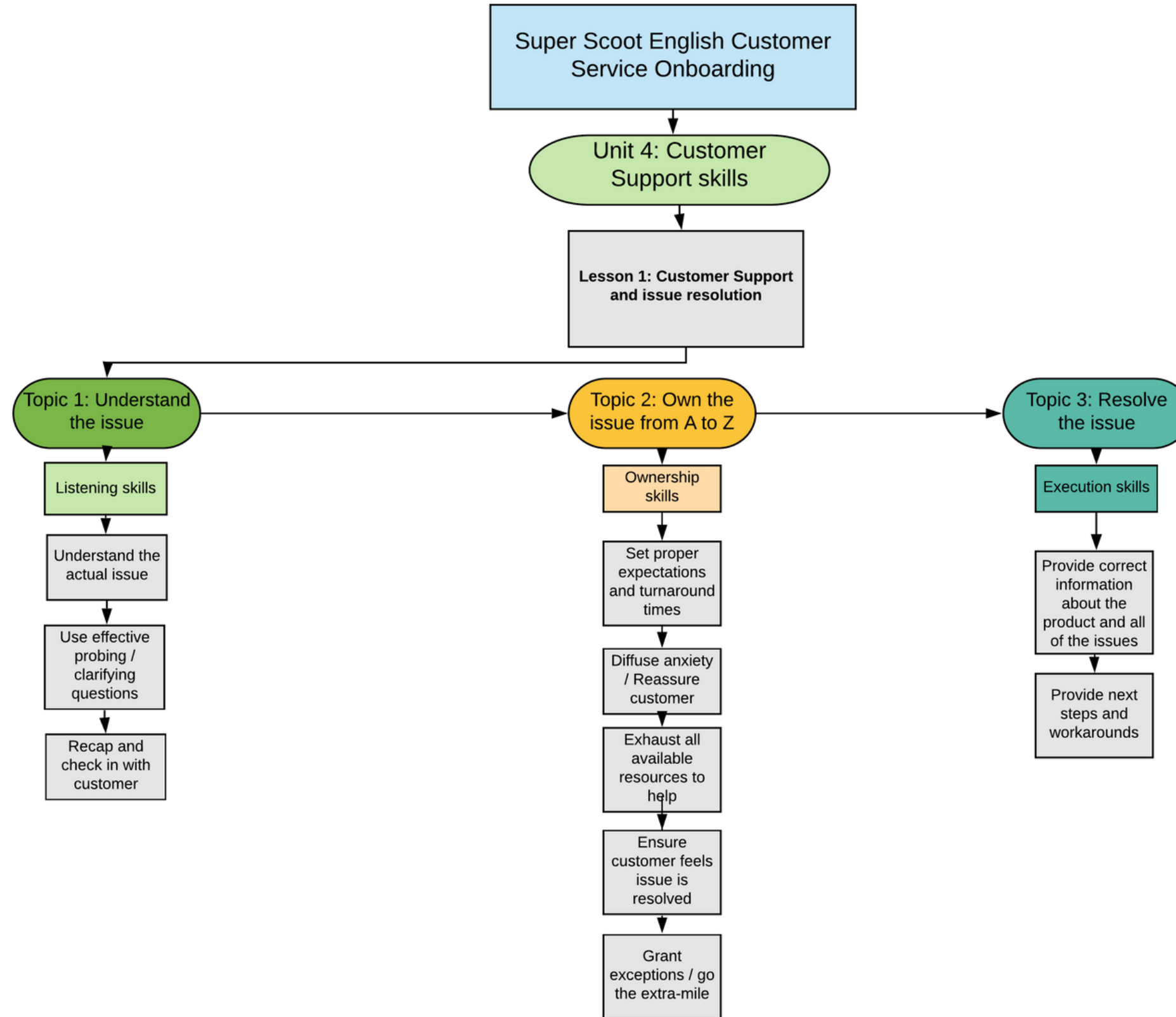
# MICRO-STRATEGIES

PRODUCT/SERVICE KNOWLEDGE



# MICRO-STRATEGIES

## CUSTOMER SUPPORT SKILLS



Media: face-to-face drill practice, face-to-face group activities, post-class online practice, multiple choice quiz

## Introduction Strategy: Overall Course

Deploy attention to lesson	After displaying introductory slides introducing facilitators and session logistics, the instructor displays slides with attention-grabbing vocabulary words that reflect feelings about customer service experiences and asks learners, "How do these words represent how some customers feel about their customer service experience?" Instructor accepts and acknowledges all learner responses and draws parallel between the words and new agent experience.
Establish Instructional Purpose	Instructor shares slides to describe the course's learning goals.
Arouse Interest and Motivation	Instructors integrate discussion from attention-grabbing vocabulary words and the importance of customer service experience using the actions from units 1-4 to set learners down the right path.
Preview Lesson	Instructor presents slide that shows a preview of the workshop, describing an overview of each unit, common elements in each unit (self-reflection and action plan), and the post-session assessment activities
Process Information	Instructor: <ul style="list-style-type: none"> <li>•Introduces the goals of the course and the needs of SuperScoot's stakeholders.</li> <li>•Provides the benefits of proper customer service onboarding and its impacts to the organization and employees.</li> </ul>
Body (Units 1-4)	Provides brief transition to subsequent units. See individual units below

## Introduction Strategy: Greeting and Gathering Vocabulary

When presented with a customer issue about our product, the support agents demonstrate the ability to understand, select and use appropriate English vocabulary to first greet the customer, listen to the complaint and then resolve the issue.

Deploy attention to lesson	Instructor uses PowerPoint deck to present learners with an example customer service survey as an individualized self-reflection activity and requests that learners think about why the customer members responded that way. Instructor thanks learners for their responses and ties activity to knowledge they are about to gain in this area of vocabulary.
Establish Instructional Purpose	Instructor shares slide to describe the unit's learning objectives.
Arouse Interest and Motivation	To arouse interest in the upcoming unit content, instructor asks learners, "Why does it matter to use proper vocabulary when dealing with a customer?" Instructor takes answers from learners and thanks them for their responses.
Preview Lesson	Instructor presents slide that shows a preview of the unit, describing an overview of each lesson, common elements in each lesson (self-reflection and action plan), and the post-session assessment activities.

## Body: Greeting and Gathering Vocabulary

Recall prior knowledge	Instructor requests learners think back to prior experience and asks learners, "Can you think of a time when you used an incorrect vocabulary word when communicating in English? What happened?" Instructor thanks learners for their responses and emphasizes the value of using proper vocabulary not just to individuals but also to SuperScoot as a whole.
Process Information & Examples	Instructor uses PowerPoint deck to provide instruction based on various learning objectives. Instructor:

	<ul style="list-style-type: none"> <li>•Provides examples of how learning vocabulary will help SuperScoot meet its goals.</li> <li>•Provides examples of how learning vocabulary will provide building blocks for Units 2-4.</li> <li>•Explains how and when to review metrics to effectively monitor progress.</li> <li>•Introduces greetings with a short video</li> </ul> <p><u>Greetings video</u></p>
Focus Attention	To arouse interest in the upcoming unit content, instructor asks students: "What happens when customer service agents don't use appropriate vocabulary?". Instructor thanks learners for their responses and ties activity to knowledge they are about to gain in this area.
Employ Learning Strategies	<p>Instructor:</p> <ul style="list-style-type: none"> <li>•Asks students to complete a short <u>BINGO</u> game to review pre-class online tutorials. Students will recognize those words in the video that follows.</li> <li>•Instructor plays a video of an example customer service calls where the agent greets and collects information.</li> </ul> <p><u>Video on Customer Service Greetings</u></p> <ul style="list-style-type: none"> <li>•Asks learners to consider, "What are some vocabulary words the agents used to properly greet customers?".</li> <li>•Checks in with discussion groups and gives guidance.</li> <li>•Instructor debriefs by asking each group to share one or two vocabulary words with the class.</li> </ul>
Practice	<p>Instructor:</p> <ul style="list-style-type: none"> <li>•Asks students to complete <u>activity #1</u> to practice the vocabulary.</li> <li>•Provides immediate &amp; direct feedback on pronunciation.</li> <li>•Students complete the communicative <u>activity #2</u> to enhance retention, transfer &amp; language production.</li> <li>•Requests that learners write summaries of their conversations with classmates.</li> </ul>

	<ul style="list-style-type: none"> <li>●Asks learners to share their responses with the class.</li> </ul>
Evaluate Feedback	<p>After activity 1 ends, instructor debriefs class with guided questions:          What words did you think were the most difficult to pronounce?          Why do you think these words are important in the context of customer satisfaction?          Instructor validates responses and provides feedback.</p> <p>After activity 2 ends, instructor debriefs with groups with guided questions:</p> <ul style="list-style-type: none"> <li>●Did communicating with your classmates help you identify gaps in your knowledge of vocabulary and pronunciation?</li> <li>●Instructor validates responses and provides feedback.</li> </ul>

## Conclusion: Greeting and Gathering Vocabulary

Summarize & Review	Instructor provides a summary of the unit's learning objectives.
Transfer Learning	<p>Instructor presents the same PowerPoint deck with the example customer service survey statement.</p> <p>Instructor asks learners to think about what they've learned in the unit and how they will apply the vocabulary to their future calls.</p> <p>Instructor asks participants to share students' thoughts on the importance of proper vocabulary and pronunciation for overall customer satisfaction.</p>
Re-motivate and Close	Instructor shows the slide with vocabulary goals on the screen and reminds learners of the importance of using proper vocabulary for overall customer satisfaction, summarizing the responses from students in the step above.

## Introduction Strategy: Phrases & Grammar

When presented with a customer issue about our product, the support agents are able to understand the customer, then select and use grammatically correct English phrases to greet the customer, respond with appropriate phrases to resolve their issue, and adjust their tone to the situation, so that the customer is satisfied with the interaction (as demonstrated by the positive customer survey score)

Deploy attention to lesson	Instructor uses a PowerPoint deck for this unit to present learners with examples of phrases to use for certain situations. Learners will be presented with another customer service survey statement as an individualized self-reflection activity and requests that learners think about why the customer members responded that way. Instructor thanks learners for their responses and ties it to knowledge they are about to gain in this area for improving customer satisfaction and preventing future calls going like this one did.
Establish Instructional Purpose	Instructor shares slide to describe the unit's learning objectives.
Arouse Interest and Motivation	To arouse interest in the upcoming unit content, instructor asks learners, "Why does it matter to use proper tone, connotation, phrases and grammar when dealing with a customer?" Instructor takes answers from learners and thanks them for their responses.
Preview Lesson	Instructor presents slide that shows a preview of the unit, describing an overview of each lesson, common elements in each lesson (self-reflection and action plan), and the post-session assessment activities.



## Body: Phrases & Grammar

<p>Recall prior knowledge</p>	<p>Instructor requests learners think back to prior experience and asks learners, "Can you think of a time when you used an incorrect phrase or tone when communicating in English? What happened?" Instructor thanks learners for their responses and emphasizes the value of using proper vocabulary not just to individuals but also to SuperScoot as a whole. Instructor gives proper sample phrases for various situations to help learners improve. Instructor presents these phrases with the correct use of tone and connotation to show the difference in warm and friendly versus cold, detached and too direct.</p>
<p>Process Information &amp; Examples</p>	<p>Instructor uses PowerPoint deck to provide instruction based on various learning objectives.</p> <p>Instructor:</p> <ul style="list-style-type: none"> <li>• Provides examples of how learning these phrases while using the proper tone will help SuperScoot meet its goals to satisfy customers (which leads to increase in sales and retention of current customers)</li> <li>• Provides examples of how learning these phrases will provide building blocks for the following units.</li> <li>• Explains how and when to review metrics to effectively monitor progress.</li> <li>• Introduces the I CARE concept with a short video</li> </ul> <p><u>"I CARE" video</u></p> <ul style="list-style-type: none"> <li>• Provides examples of proper phrases for certain parts of the call (e.g. greeting the customer, asking questions, understanding the customer, and closing the call).</li> </ul>
<p>Focus Attention</p>	<p>To arouse interest in the upcoming unit content, instructor asks students: "What happens when customer service agents don't use the appropriate tone, grammar and phrases?". Instructor thanks learners for their responses and ties activity to knowledge they are about to gain in this area.</p>
<p>Employ Learning Strategies</p>	<p>Instructor:</p> <ul style="list-style-type: none"> <li>• Asks students to break out into groups of 3 to practice a customer service call scenario (script provided)</li> <li>• Plays a video example of a customer service call where the agent greets and collects information.</li> <li>• Plays an example of a customer service call gone wrong</li> </ul> <p><u>Bad Customer Service Example Video</u></p>

	<ul style="list-style-type: none"> <li>• Asks learners to consider, "What are a few ways the calls could have been improved?" (e.g. How could they have made the call more friendly and warm? How could they have used greetings or tone more appropriately?)</li> <li>• Checks in with discussion groups and gives guidance.</li> <li>• Instructor debriefs by asking each group to share one or two ways the call could have been improved with the class.</li> </ul>
Practice	<p>Instructor:</p> <ul style="list-style-type: none"> <li>•Asks students to complete role-play activity to practice key phrases and tone.</li> <li>•Teacher should provide immediate direct feedback on pronunciation and tone of key phrases.</li> <li>•Teacher asks learners to critique others in a group and share their learning and feedback with the class.</li> </ul>
Evaluate Feedback	<p>After the scenario ends, instructor debriefs with groups with guided questions:</p> <ul style="list-style-type: none"> <li>•Did any of you get stuck on any particular situation when assisting a customer?</li> <li>•Why do you think these types of greetings or phrases are important in the context of customer satisfaction?</li> <li>•Instructor asks for student feedback (critique of other students)</li> <li>•Instructor validates responses and provides feedback.</li> </ul> <p>After the scenario ends, instructor debriefs with groups with guided questions:</p> <ul style="list-style-type: none"> <li>•Did practicing this scenario with your classmates help you identify gaps in your knowledge of tone, grammar, and key phrases?</li> <li>•Instructor validates responses and provides feedback</li> </ul>

## Conclusion: Phrases & Grammar

Summarize & Review	Instructor provides a summary of the unit's learning objectives.
Transfer Learning	<p>Instructor presents the same PowerPoint deck with the example customer service survey statement.</p> <p>Instructor asks learners to think about what they've learned in the unit and how they will apply it to their future calls.</p> <p>Instructor asks participants to share students' thoughts on the importance of proper phrases and tone for overall customer satisfaction.</p>
Re-motivate and Close	Instructor shows the slide with the phrases and grammar goals on the screen and reminds learners of the importance of them for overall customer satisfaction, summarizing the responses from students in the step above.

## Introduction Strategy: Product/Service Knowledge

When confronted with questions from customers, customer service agent can accurately resolve issues with product features, usability, and app coordination with the product. The agent is comfortable with all vocabulary, visual depictions, and phrases to describe how to use the product. Customer service agents will be able to provide appropriate customer support regarding the company’s product when faced with a customer support inquiry. Agents will be able to describe, assess, and resolve the customer’s issue with the product within an appropriate period for a customer service interaction

Deploy attention to lesson	Instructor uses PowerPoint deck to present learners with an example diagram of a SuperScoot Scooter and issues a short fill in the blank quiz to gauge entry-level knowledge of the product. Instructor thanks learners for their responses and ties activity to knowledge they are about to gain in this area.
Establish Instructional Purpose	Instructor shares slide to describe the unit’s learning objectives.
Arouse Interest and Motivation	To arouse interest in the upcoming unit content, instructor asks learners, “Why does it matter to describe features accurately to customers?” Instructor takes answers from learners and thanks them for their responses.
Preview Lesson	<p>Instructor presents slide that shows a preview of the unit, describing an overview of each lesson, common elements in each lesson (self-reflection and action plan), and the post-session assessment activities.</p> <p><a href="#">Session overview</a>  <a href="#">Session evaluation</a></p>

## Body: Product/Service Knowledge

Recall prior knowledge	Instructor requests learners think back to prior experience and asks learners, "Can you think of a time you didn't know how to use a product correctly? What happened?" Instructor thanks learners for their responses and emphasizes the value of having full product knowledge for the benefit of the company as a whole.
Process Information & Examples	<p>Instructor uses PowerPoint deck to provide instruction based on various learning objectives.</p> <p>Instructor:</p> <ul style="list-style-type: none"> <li>●Provides examples of how understanding the product will help SuperScoot meet its goals.</li> <li>●Provides examples of how understanding the features; removes barriers to stellar customer service.</li> <li>●Reviews results of entry level skills assessment to determine pre-existing knowledge.</li> </ul> <p><a href="#">Entry level skills assessment results</a></p>
Focus Attention	To arouse interest in the upcoming unit content, instructor asks students: "What happens when they don't know how to describe the product?". Instructor thanks learners for their responses and ties activity to knowledge they are about to gain in this area.
Employ Learning Strategies	<p>Instructor:</p> <ul style="list-style-type: none"> <li>●Asks students to complete a short matching game to match labels to diagram. Students will recognize those features in the live product demo that follows.</li> </ul> <p>LIVE PRODUCT DEMO</p> <ul style="list-style-type: none"> <li>●Asks learners to consider, "What are some areas that may not be intuitive to customers?".</li> <li>●Checks in with discussion groups and gives guidance.</li> <li>●Instructor debriefs by asking each group to share one or two vocabulary words with the class.</li> </ul>
Practice	<p>Instructor:</p> <ul style="list-style-type: none"> <li>●Asks students to complete <a href="#">activity #1</a> to practice the memorization of parts.</li> <li>●Teacher should provide immediate direct feedback on accuracy.</li> </ul>

	<ul style="list-style-type: none"> <li>•Students complete a role-play to enhance retention, transfer &amp; language production.</li> <li>•Requests that learners write summaries of their conversations with classmates.</li> <li>•Asks learners to share their responses with the class.</li> </ul>
Evaluate Feedback	<p>After role play ends, instructor debriefs with groups with guided questions:</p> <ul style="list-style-type: none"> <li>•What features were most difficult to describe?</li> <li>•Why do you think these are important in the context of customer satisfaction?</li> <li>•Instructor validates responses and provides feedback.</li> </ul> <p>After another role play ends, instructor debriefs with groups with guided questions:</p> <ul style="list-style-type: none"> <li>•Did communicating with your classmates help you identify gaps in your knowledge of product features?</li> <li>•Instructor validates responses and provides feedback</li> </ul>

## Conclusion: Product/Service Knowledge

Summarize & Review	Instructor provides a summary of the unit's learning objectives.
Transfer Learning	<p>Instructor presents the same PowerPoint deck with the example customer service survey statement.</p> <p>Instructor asks learners to think about what they've learned in the unit and how they will apply the product knowledge to their future calls.</p> <p>Instructor asks participants to share students' thoughts on the importance of accurate knowledge for overall customer satisfaction.</p>
Re-motivate and Close	Instructor shows the slide with goals on the screen and reminds learners of the importance of using accurate descriptions for overall customer satisfaction, summarizing the responses from students in the step above.

## Introduction Strategy: Customer Support Skills

Objectives: when presented with a customer issue, support agents are able to connect and reassure the customer, correctly interpret the issue, identify the root cause, own the resolution independently from A to Z and advise the customer on the next suitable steps to resolve it without escalating to supervisor (when not needed) and in less than 24 hours.

As the last unit of the course, students will need to use all previously acquired (and practiced) knowledge to successfully go through Unit 4. The unit design will focus on problem-solving strategies for ill-structured problems, as the desired outcome is for the support agents to be able to understand the customer's issue, identify the root cause and actually provide steps to resolve the problem - and all customers' issues are widely different and can require a great variety of possible solutions.

Also, each topic will provide the necessary knowledge to tackle the following, and practicing the learning from each sub-unit before moving onto the next one will overall enhance the learning strategy.

Deploy attention to lesson	In the introduction phase, the instructor will ask support agents what they think will be the objective of the last course unit ('Considering what you have learned in the previous units, what do you think will this unit focus on?') and also play a recording of a challenging call with a customer. This will represent the example of a challenging problem that agents will eventually be able to find a solution for.
Establish Instructional Purpose	The purpose of the unit will be disclosed by the instructor, emphasizing the importance of this last unit to be able to successfully handle and resolve customers' issues after having passed all the previous units focusing on the essential skills related to vocabulary and tone, grammar and product knowledge. Despite the learning outcome being focused on problem-solving, this part will be more supplantive as the instructor will provide a one-sheeter with the objectives for the unit so that learners can track progress and accomplishments.
Arouse Interest and Motivation	<p>The instructor will initially ask the class to listen to a real life interaction between a customer and the support staff and the following questions:</p> <ul style="list-style-type: none"> <li>• Was the issue resolved?</li> <li>• In your opinion, was the customer happy/unhappy?</li> <li>• Did the agent go above and beyond to resolve the issue?</li> </ul> <p>This way, the instructor will arouse interest and genuine discussion following a more generative approach. In addition, the instructor will state that this unit is the final one and that learning how to resolve customers' issues will have a decisive impact on their core role and performance as support agents.</p>

Preview Lesson	<p>The preview of the 3 sub-units will be presented to the class. The instructor will go through each topic, explaining the content and the related skills that will be practiced, the pre and post-assessments and what will be considered as 'mastery' level after completing the unit.</p> <p>Example: 'In this unit we will tackle the skills that will be helpful for you to actually resolve a customer's issue when presented with one. We will start with a pre-assessment to recall and test previous and current knowledge and we will then dive into the first topic: Understanding the issue. In this sub-unit, we will go through the listening skills you'll need to fully understand and interpret a customer's issue to make sure you have understood it correctly.</p> <p>The second part will focus on owning the issue and its resolution fully, making sure the customer feels taken care at each step of the process. We will learn how to diffuse customer's anxiety and reassure them that everything to help them has been done. Lastly, we will focus on execution skills to be able to resolve all issues and/or advise on next steps without escalating to supervisors when unnecessary. Throughout each sub-unit you'll need to recall the knowledge you have acquired on support vocabulary, tone, grammar and product knowledge, as it'll be essential to understand the content presented here and also pass the final assessment to reach 'mastery' level.</p>
----------------	--

## Body: Customer Support Skills (Listening)

Recall prior knowledge	<p>Since problem-solving is a critical learning outcome for Unit 4, learners will be asked to review all the relevant prior knowledge that they will employ throughout the lessons.</p> <p>In this case, they will need to review:</p> <ul style="list-style-type: none"> <li>• Support vocabulary (with particular focus on connecting with customers)</li> <li>• Phrases and grammar (with particular focus on greetings and follow-up questions)</li> <li>• Product knowledge</li> </ul> <p>The instructor will also:</p> <ul style="list-style-type: none"> <li>• Encourage the review and use of notes taken during the prior units of the course</li> <li>• Prompt students to think about scenarios where they have employed some listening skills outside of work</li> </ul>
------------------------	--



<p>Process Information &amp; Examples</p>	<p>In the first sub-unit focused on Listening, the Active Listening framework will be introduced (by psychologists Carl Rogers and Richard Farson), which will be used by learners as a guide to resolve the first set of problems related to Listening.</p> <p>The Active Listening stages presented in this sub-unit are:</p> <ul style="list-style-type: none"> <li>• Show interest</li> <li>• Engage</li> <li>• Empathize</li> <li>• Keep an open mind</li> </ul> <p>Learners will go through the different stages of Active Listening guided by the instructor, who will introduce the theory of each listening strategy using a variety of media (presentations, videos, group discussions) and then dedicate a large part of the lesson to practice (mainly role play and discussions) in order to facilitate transfer. The problems presented in the practice will be increasingly complex, starting with generic scenarios that students can relate to, to end with scenarios related to SuperScoot’s customer issues. Finally, the instructor will prompt students to identify cases where the application of the listening strategies is appropriate or inappropriate.</p>
<p>Focus Attention</p>	<p>To help with focusing attention, the instructor will ask students to take comprehensive notes when going through some critical listening techniques and strategies, which will be useful during the practice and also during their core job after completing the course.</p> <p>Targeted practice exercise will also be a natural method to focus attention on specific relevant parts of the content that will be most helpful to help learners acquire the desired skills.</p>
<p>Employ Learning Strategies</p>	<p>Agents will be generally left free to employ whatever learning strategy has been proved successful. However, the instructor will get a sense of the success of these strategies during the regular practice sessions and will be able to provide guidance based on the deficit encountered.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Learners are divided into groups</li> <li>• Learner 1 has to present a challenging issue they’re facing</li> <li>• Learner 2 has to understand and rephrase the issue using alternative words and phrases</li> <li>• If the learner doesn’t understand the issue, the instructor will guide learners through other ways of stating the same challenge like rephrasing, drawing, finding an analogy....</li> </ul>

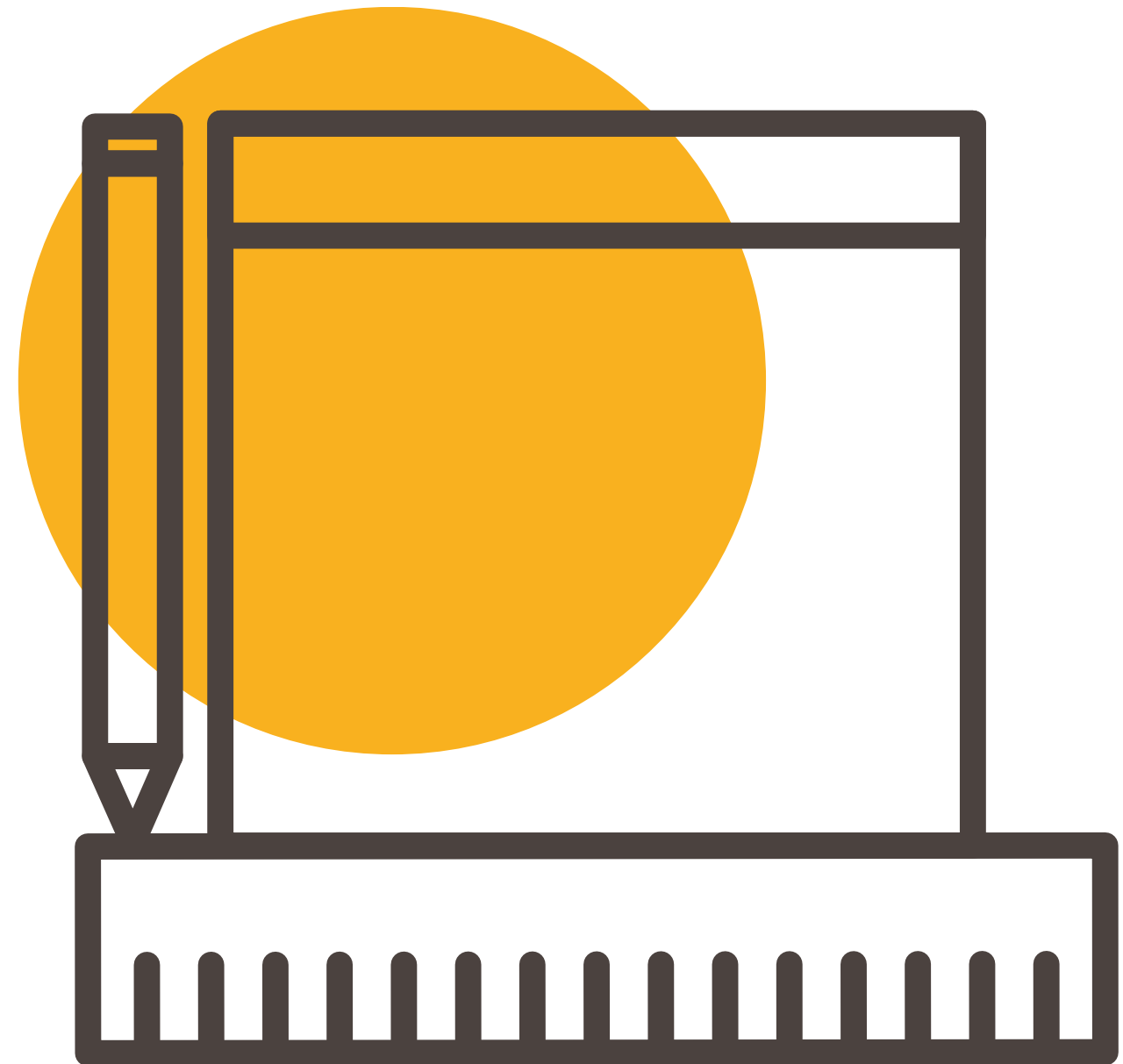
	<ul style="list-style-type: none"> <li>• Instructor will play a recorded customer call with SuperScoot</li> <li>• Learners will have to find relevant and appropriate information about Active Listening in the Knowledge Based system or in the current course.</li> <li>• Learners will have to write down a set of phrases they would have used to identify &amp; clarify the issue, and connect with the customer based on the retrieved information.</li> <li>• The instructor will then present the correct strategies to find relevant information in the available company's resources to help in future similar scenarios.</li> </ul>
Practice	<p>The Listening sub-unit will focus on the first set of skills that are necessary to then be able to resolve the final complicated problem (find a solution to the customer's issue). At the end of the instructor's explanation for each Active Listening strategy explained above, there will be a comprehensive practice section that specifically focuses on that part. The learners will play a central role in generating insights and feedback, while the instructor will observe outcome and learning strategies effectiveness, while providing regular collective and individual feedback.</p> <p>Example: Active Listening exercise: Engage role-play</p> <ul style="list-style-type: none"> <li>• Learners are paired. Learner 1 is the customer and has to present their issue.</li> <li>• Learner 2 is prompted to ask questions and encourage Learner 1 to elaborate or expand their perspectives.</li> <li>• Learner 2 shares feedback on what has been said by paraphrasing, asking clarifying questions and summarizing Learner 1 comments regularly.</li> <li>• Switch roles.</li> <li>• Instructor will provide feedback to the pair and there will also be peer evaluations.</li> </ul>
Evaluate Feedback	<p>After each activity:</p> <ul style="list-style-type: none"> <li>• The instructor will provide customized formative feedback to each group / student. A checklist will be used as evaluation reference to assess that the learners are showcasing the relevant behaviors and attitudes or the appropriate problem solving techniques.</li> <li>• In the role-play scenarios, there will also be additional peer reviews where students will act as coaches.</li> <li>• The instructor will also demonstrate correct behaviours or techniques whenever students encounter difficulties with one specific area.</li> </ul>

## Conclusion: Customer Support Skills (Listening)

<b>Summarize &amp; Review</b>	<p>At the end of the lesson, learners are prompted to review the learnings and the Active Listening strategies used.</p> <p>The instructor will clarify any gray area and provide a recap of the most relevant techniques to be kept in mind when assisting customers.</p> <p>Students are asked to create a recap of the lesson learnings for future reference and to link them to the unit's objectives presented in the introduction.</p>
<b>Transfer Learning</b>	<p>In order to promote transfer, students will be asked to:</p> <ul style="list-style-type: none"><li>• Come up with and write down additional scenarios where Active Listening could be deployed as homework and then present to the class.</li><li>• Online research successful customer support stories where Listening was a crucial skill employed by the support staff.</li></ul>
<b>Re-motivate and Close</b>	<p>The instructor will re-emphasize the importance of each topic presented in Unit 4 as the last piece to be able to properly handle customers' issues from A to Z and also positively contribute to the overall customer satisfaction and brand reputation.</p>

# FORMATIVE EVALUATION PLAN

A formative evaluation was conducted before the development of this training and its creation. Revisions will be made to assure that the training stays aligned with organizational goals and customer expectations. Design reviews and one-to-one evaluations were used in the development of this instruction. For our one-to-one evaluations, we will conduct interviews at the end of the training with students and instructors & administer a checklist to managers and a survey to learners.



# FORMATIVE EVALUATION PLAN

## QUESTIONS TO BE ANSWERED IN THE LEARNERS SURVEY INCLUDE:

- How easy is it to understand and follow the curriculum? Both language-wise and material-wise.
- In what areas and to what extent does the instruction provide motivational support to learners?
- In what areas and to what extent does the instruction need improvement?
- In what areas and to what extent does the instruction meet the intended learning objectives?
- In what areas and to what extent do you find the instruction useful?



# FORMATIVE EVALUATION PLAN

## CHARACTERISTICS OF MATERIALS

We will send out a survey via Survey Monkey, asking participants to enter their names so that we can send them out to everyone at once. We will view evaluations by each participant's response. Some parts may require in-person interviews, so we will follow up in person if we need more information on those parts.



# FORMATIVE EVALUATION PLAN

## LEARNERS CHARACTERISTICS

We will observe, talk to, and assess our learners to determine their characteristics. We plan to do the following to find out more about them :

- Interview other people who have worked with these learners before
- Interview and/or observe the learner's activity through the LMS, discussion boards and participation in class
- Have learners complete surveys that provide information about their background, interests, learning styles, and reaction to the materials
- Examine job descriptions and online profiles from the company's employee connections portal
- Assess student characteristics such as behavior, gender, special needs, and background to ensure an inclusive and fair assessment of diverse students due to a large global audience

# FORMATIVE EVALUATION PLAN

## PROCEDURES FOLLOWED

We would follow the following procedures when evaluating:

### 1. Study our audience to determine:

- who will be making decisions based on the evaluation
- who will provide input to the evaluation
- who will be impacted by the evaluation report
- who will have access to the evaluation report

### 2. Ask good evaluation questions (seen above)

### 3. Plan the evaluation

- Evaluation design (timing, decision makers, feasibility & inclusivity)
- Data collection (Quantitative vs. qualitative/ why, how long, when, how)
- Data analysis (plan to make it easy to understand & determining how, who & why)
- Create a data processing alignment table

### 4. Determine the process for reporting results and making recommendations

- How to avoid bias
- What visual aids to use
- Confirm that our report aligns with evaluation questions
- How to recommend based on findings
- How to give the client options
- Make an effort to fully understand the impact of the recommendation



# FORMATIVE EVALUATION PLAN

## DATA GATHERED

1. Quantitative data- to gauge perceptions of the learning material and performance of the students.
  - a. Student surveys
  - b. Evaluation of post-assessment scores to measure their obtainment of learning objectives
  - c. Instructor interviews
  - d. Manager checklist, interviews and questionnaires
  
2. Qualitative data- use non-numerical data and more open-ended questions to dig deeper into responses.
  - a. Interview participants
  - b. Monitor the students' phone calls for a week after training to verify the quality of customer service has improved
  - c. Interview managers to measure their perception on how employees have improved
  - d. Review information from customers' post-call surveys

Questions	Data Source	Information Gained	Revision Decision
How easy is it to understand and follow the curriculum? (Both the language and material)	Student surveys and interviews Instructor surveys	Students had difficulty understanding technical vocabulary and pronunciation	Include a specific lesson on more technical words in Unit 1, with an emphasis on pronunciation.
In what areas and to what extent does the instruction provide motivational support to learners?	Student surveys and interviews Instructor surveys	Because of the reward system clearly stated throughout the course, the learners were extremely motivated to learn the material	No revision needed
In what areas and to what extent does the instruction need improvement?	Student surveys, interviews and questionnaires Instructor surveys, interviews and questionnaires	Students felt the vocabulary and phrase sections were redundant. Instructors feel these units could be combined.	Combine Units 1 & 2 to present vocabulary and phrases together for a more communicative lesson.
In what areas and to what extent does the instruction meet the intended learning objectives?	Monitor the students' phone calls for a week Manager interviews and questionnaires Review information from customers' post-call surveys	The students' abilities in English and customer service showed great improvement, as seen in the CSAT scores for the week after instruction	Continue to monitor the post-call CSAT scores to verify that the improvement will be a long-term change.
In what areas and to what extent do you find the instruction useful?	Evaluation of post-assessment scores Interview students	As students must complete the course to be hired or stay employed, along with the reward system clearly stated, they all felt the instruction was useful.	No revision needed

# FORMATIVE EVALUATION PLAN

## INTERPRETATIONS AND REVISIONS

Prior to the development of this training, all materials were reviewed by the instructional design team of SuperScoot, L&D and members of the leadership team. Learning goals, task analysis and instructional strategies were reviewed and these goals were validated in a meeting with the Director of L&D. The instructional design team and the Director of L&D prioritized the goals into the main training modules of the workshop:

- ·Use phone greetings and colloquialisms with customers
- ·Explain product features
- ·Interpret and resolve customer issues with a polite service attitude
- ·Ask probing questions to address customer concerns without escalation



# FORMATIVE EVALUATION PLAN

## INTERPRETATIONS AND REVISIONS

During design of this training curriculum, an in-depth analysis of the target learner profile was performed. The results of it address both the cognitive characteristics of the learners in addition to their attitudes and motivations for taking this training.

The post-assessment requires learners demonstrate mastery of the content by an 80% criterion. It will show us what learners will need to improve on so that we can improve our training.

The survey given to learners will allow us to measure their reaction to the training, while the performance checklist for the managers will show if they have mastered performance related competencies. This checklist will give us insight into whether or not there has been a positive behavior change.

# BIBLIOGRAPHY

4 Key Measurements for Customer Satisfaction. (2020, March 2). Retrieved from <http://www.qualtrics.com/experience-management/customer/measure-customer-satisfaction/>

Dousay, T. A. (2018). Instructional design models. In R. West (Ed.), *Foundations of Learning and Instructional Design Technology* (1st ed.).

Krashen, S.D. & Terrell, T.D. (1983). *The natural approach: Language acquisition in the classroom*. London: Prentice Hall Europe.

Smith, P. L., & Ragan, T. J. (2005). *Instructional design*. Hoboken, NJ: J. Wiley & Sons.

Test coverage and Format. (n.d.). Retrieved March 20, 2020, from <https://www.expertratinginc.com/testsyllabus.aspx?examid=7135&catid=239>

Willott, L. (2019, April 29). NPS and CSAT Score Benchmarks by Industry. Retrieved from <http://www.customerthermometer.com/customer-satisfaction/>