Northern Energy Content Map

SAMPLE TOPIC
What is the training topic?
Creating Positive Customer Interactions
Are you the subject matter expert (SME) or did you select a topic from Source Content?
I am a subject matter expert.

DEFINED BUSINESS GOAL AND PROBLEM
Define the business that your sample relates to: What type of business is it? What industry is it a part of? What is the name of the business (fictional or real, if volunteering for a real company)?
This is a gas and power company for a region within the state of Wisconsin. Its name is Northern Energy.
What is the business goal for this training? What does success look like for the company?
Our goal is to strengthen the company's desired reputation by increasing customer satisfaction by 50% within six months and 100% within one year. Success is increasing positive customer feedback through surveys of our call center demonstrating that employees prioritize customer satisfaction and recognize the impact of their actions on customer perception.
What is the business problem (gap), that when solved or closed, would help the organization reach the above goal? In other words, WHY is the goal not being met right now?
The company has experienced a downward trend in positive public perception. Based on feedback from our call center, approximately fifty percent of customers have reported a negative customer service experience in the last eighteen months. In reviewing the history of employee training, managers noted that very little training on explicit customer service skills has been designed and implemented.

AUDIENCE
Who are the primary learners (audience) that will be taking the training? Be specific.
The primary learners will be all employees who interact with customers in our call center.
What are the basic demographics of your primary learners?
The primary learners are of all ages and backgrounds. They have worked with the company for a wide range of times and new hires will be included as well.
What are your learners' prior knowledge/skill level?
The primary learners have a wide variety of prior knowledge and skills levels. Our company has provided very little explicit training on customer service skills, however, so the knowledge base has not been grown at company level.
(Current State) What is currently happening with the target audience that needs to change? Before learners take your training, what are they doing, or not doing successfully?
Currently, at least half of our company's customer interactions result in a negative customer service review or feedback. Our learners are not creating customer-centric interactions.
(Future State) What should the target audience be doing? Once learners complete the training, what should learners be able to do successfully?
Our primary learners need to create positive, customer-centric interactions during call center inquiries. Customers should leave this interaction feeling heard, valued and satisfied.

ACTIONS NEEDED TO MEET GOAL
1. **In the fields below, list all of the actions that a learner would need to take for the business goal to be achieved.** 2. **State HOW these actions tie back to the business goal.**
Copy your business goal below.
Our goal is to strengthen the company's desired reputation by increasing customer satisfaction. Success is increasing positive customer feedback through surveys demonstrating that employees prioritize customer satisfaction and recognize the impact of their actions on customer perception.

Action 1:	Action 2:	Action 3:	Action 4:
Greet the customer appropriately and positively.	Listen to the customer's issue(s) with attention and recall.	Repeat the issue(s) to the customer, checking for clarity.	Describe a plan of action for problem resolution.
How Action 1 ties to the business goal:	**How Action 2 ties to the business goal:**	**How Action 3 ties to the business goal:**	**How Action 4 ties to the business goal:**
Helping customers feel welcomed and valued can lead to positive public perception.	Reflective listening and appropriate questions will create a clear picture of the issue(s).	Customers feel heard if they hear that their issue(s) is understood. This will increase their positive feeling toward the company.	Customers will feel satisfied if a clear plan of action is outlined along with a time frame for the resolution of their issue(s).
Action 5:			
Close the call with the customer positively.			
How Action 4 ties to the business goal:			
This is a final chance to create a positive interaction with the customer and help them feel valued.			

LEARNING OBJECTIVES (LOs)
1. In the fields below, first list all of the terminal learning objectives (LOs) that the learner will need to achieve to meet the business goal. Your sample should have 2-4 terminal LOs.   2. State which action (from above) each LO is tied to and refines.

3. If there is an enabling LO that supports the terminal LO, list that below. (Not all terminal LOs may have a supporting enabling LO. Terminal LOs may stand on their own, but enabling LOs should not.)			
Terminal LO 1:	**Terminal LO 2:**	**Terminal LO 3: (optional)**	**Terminal LO 4: (optional)**
Greet customer using appropriate greetings while gathering important information.	Summarize customer's issue(s) to verify information and understanding.	Describe a plan of action to solve customer issue(s).	Close customer interaction with positive, summarizing details.
Which action does this LO refine? (copy/paste the action)	**Which action does this LO refine? (copy/paste the action)**	**Which action does this LO refine? (copy/paste the action)**	**Which action does this LO refine? (copy/paste the action)**
Greet the customer appropriately and positively.	Repeat the issue(s) to the customer, checking for clarity.	Describe a plan of action for problem resolution.	Close the call with the customer positively.
Are there any enabling LOs that support this terminal LO? (optional)	**Are there any enabling LOs that support this terminal LO? (optional)**	**Are there any enabling LOs that support this terminal LO? (optional)**	**Are there any enabling LOs that support this terminal LO? (optional)**
	Listen to the customer's issue(s) with attention.		

CONTENT OUTLINE	

1. List the subtopics (categories of chunked content) in a meaningful order below.
2. For each subtopic of information, state
    a. which action(s) it maps to.
    b. which terminal LO(s) it maps to. (It is possible to have more than one LO map to a subtopic.)
3. Outline the information that each subtopic will cover. Avoid going beyond the scope of the LOs. Only include information that is needed to achieve the LOs.	

Subtopic 1:	**Subtopic 2:**

Appropriate greetings	LIstening, questioning, restating customer issue(s)
Which action(s) does this section map to?	**Which action(s) does this section map to?**
Greet the customer appropriately and positively.	Repeat the issue(s) to the customer, checking for clarity.
Which terminal LO(s) does this section map to? (copy/paste the LO)	**Which terminal LO(s) does this section map to? (copy/paste the LO)**
Greet customer using friendly, appropriate greeting and introduction while gathering important information.	**Summarize customer's issue(s) to verify information and understanding.**
Information / details	**Information / details**
- Time of day greeting with company name - Introduce self - Ask for their name - Offer of help	- Listen carefully and/or take notes - Ask any clarifying questions - Restate issue to customer - Ask if correct
(Optional) Subtopic 3:	**(Optional) Subtopic 4:**
Refer to issue solution index	Implement appropriate closing.
Which action(s) does this section map to?	**Which action(s) does this section map to?**
Describe a plan of action for problem resolution.	Close the call with the customer positively, summarizing details.
Which terminal LO(s) does this section map to? (copy/paste the LO)	**Which terminal LO(s) does this section map to? (copy/paste the LO)**
Describe a plan of action to solve customer issue(s) including an expected time frame.	**Close customer interaction with positive summarizing details.**
Information / details	**Information / details**
Inform customer of short hold (if needed)	Use customer name

- Refer to issue solution index - Familiarize self with all steps - Clearly communicate to customer - Include probable time frame of resolution - Ask if any clarification needed	- Appreciation for the call/their business - Time of day closing

FINAL ASSESSMENT

1. **Write each stem as a performance-based scenario question set in a realistic context.**
2. **Identify which LO each question evaluates.**
3. **List the correct response and the distractors.**
4. **Provide clear feedback that explains what the correct answer is, and why.**

Question 1:	Question 2:	Question 3:
Your line rings for the first call of the day. How do you greet your customer? Choose the best answer.	A customer named Mr. Finn has launched into a very lengthy explanation of the problems he is experiencing. He has not stopped to take a breath in awhile. How do you handle this? Choose the best answer.	Mrs. Simpson has just explained that her electric bill has been very erratic every month for the last six months. What is the best response to her?
Which LO does this question assess? (copy/paste the LO)	**Which LO does this question assess? (copy/paste the LO)**	**Which LO does this question assess? (copy/paste the LO)**
Implement appropriate greetings.	**Summarize customer's issue(s).**	**Summarize customer's issue(s).**
Correct Response:	**Correct Response:**	**Correct Response:**
Good _____ morning/afternoon/evening, thank you for calling Northern Energy! My name is Georgia. May I have your name? Hello _____, how can I help you today?	Take notes about what the customer is saying without interrupting. Use positive verbal check-ins such as "okay" or "I see".	Mrs. Simpson, thank you for sharing your concerns. I hear you saying that it has been frustrating to get bills some months that are high and other months that are low, is that correct?

Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)
- Hello. You have reached Northern Energy. My name is Georgia and you are...? What do you need? - Good _____ morning/afternoon/evening. I'm here to help you. What is your name? - Good _____ morning/afternoon/evening. Thank you for calling Northern Energy. What is your name and how can I help?	- Take notes about what the customer is saying. After sixty seconds, interrupt with a clarifying question. - After thirty seconds, ask him to pause. Then, restate what he has said so far.	- Mrs. Simpson, I couldn't agree more. The electric bills can be really out of hand. - I'm not sure why this bothers you, Mrs. Simpson. We offered you budget billing in March, but you turned us down. - Mrs. Simpson, I missed what you were saying. Could you repeat your issue, please?
Review feedback for incorrect responses (What is the correct answer, and why?)	**Review feedback for incorrect responses (What is the correct answer, and why?**	**Review feedback for incorrect responses (What is the correct answer, and why?**
Correct! To ensure that our customers feel valued, our greetings need to include a time of day greeting with company name, self introduction, asking of their name and inquiring how you can help.	Correct! Our customers deserve the time to explain why they are calling. Interruptions make people feel like they are not being heard. Be sure to listen and take notes, ready to summarize and clarify when the customer stops explaining.	Correct! Your response after listening to a customer's concerns should include an acknowledgement of their worth to the company and a concise summary of what was explained. Follow up with any questions to clarify if you heard correctly.
Question 4:	**Question 5:**	*Duplicate columns for additional Subtopics, if needed*
A customer named Joan just explained her complex issue and she verified that you summarized it correctly. What next steps do you take? Choose all that apply.	You just had a customer call in who was very challenging to handle. You've gotten him to understand the resolution and time frame it will take. He says he has no more questions. How do you close this call? Choose the best answer.	
Which LO does this question assess? (copy/paste the LO)	**Which LO does this question assess? (copy/paste the LO)**	

Illustrate plan of action to solve customer issue(s).	Implement appropriate closing.	
Correct Responses:	**Correct Response:**	
If I remember the steps for resolution, I let the customer know clearly. If I don't, I refer to the Issue Solution Index. I relate the time frame for the resolution. I ask if the customer has any questions regarding the resolution process.	[Customer name], thank you for calling. We value your business at Northern Energy. Please have a great rest of your [time of day].	
Distractors (Incorrect Responses)	**Distractors (Incorrect Responses)**	
- If I remember all the steps for resolution, I put the customer on hold while I take a quick breath. - I ask the customer how long they would like the resolution to take.	[Customer name], it was great talking with you. Okay then, take care! [Customer name], you have been served by [your name]. Call again! - Great. Bye [customer name].	
Review feedback for incorrect responses (What is the correct answer, and why?	**Review feedback for incorrect responses (What is the correct answer, and why?**	
Correct. To help our customers feel heard, we need to clearly relate the company's steps of resolution and expected time frame. We also need to check for their understanding.	Correct. A closing should include the customer's name, the name of the company and a positive wish for the rest of their day.	