e-Learning high-level instruction design document

OPWL 551
Summer, 2021
Colette Piper

Title of e-learning (and URL if available)

Managing New Client Application Pitfalls

Course topic (workplace learning appropriate)

Analyze a new client application (ten minute triage).

Problem or opportunity

New staff require practice in analyzing new client applications to understand the consequences of missing critical details or pushing an application through the process. Approximately 80% of our new client applications require 1-4 hours of rework when transitioning from scoping services to reviewing a new client application (application is also called the Organic System Plan).

Expected learning or performance outcome

- Analyze paperwork for major errors within five to ten minutes.
- Communicate the process and findings to the client.

Relevant characteristics of the target learner audience

- Young adult / adult in age
- College educated (or equivalent work experience)
- 0-3 years industry experience, Novice within the role
- Computer literate
- Motivated to learn an important task within this role
- Perception for available time - limited due to current staffing shortage and consequences related to this training mostly fall on another department
- Asynchronous training session

Environmental analysis

This learning object requires a small amount of time to complete (approximately 15 minutes) and works to reduce rework throughout the new client certification process. The LO is intended for novice staff working in the Client Relationship Officer role where members of the department are often new to the industry (0-3 years of experience).

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Required materials

- Learner may reference a new client application prepared for the training.
- Access to laptop and browser.

Technical requirements

Up-to-date operating system and browser

Design specifications

Testing/Certification

Not applicable

Knowledge and/or skill type

Analyze a situation - Break down a client's requested service and match their planned activities to applicable sections of a generic application.
Interpersonal skills are a component of the training but not the primary skill we intend to develop.

Learning domains

Research, analysis, and rationale

- Access information within the client file
- Verify details within the application against the requested service(s)

Assessment strategy (i.e., response options, test items)

Feedback and guidance only - no assessment items

Trigger events

An incoming client call asks the learner to open a new client application and triage within

approximately 10 minutes.

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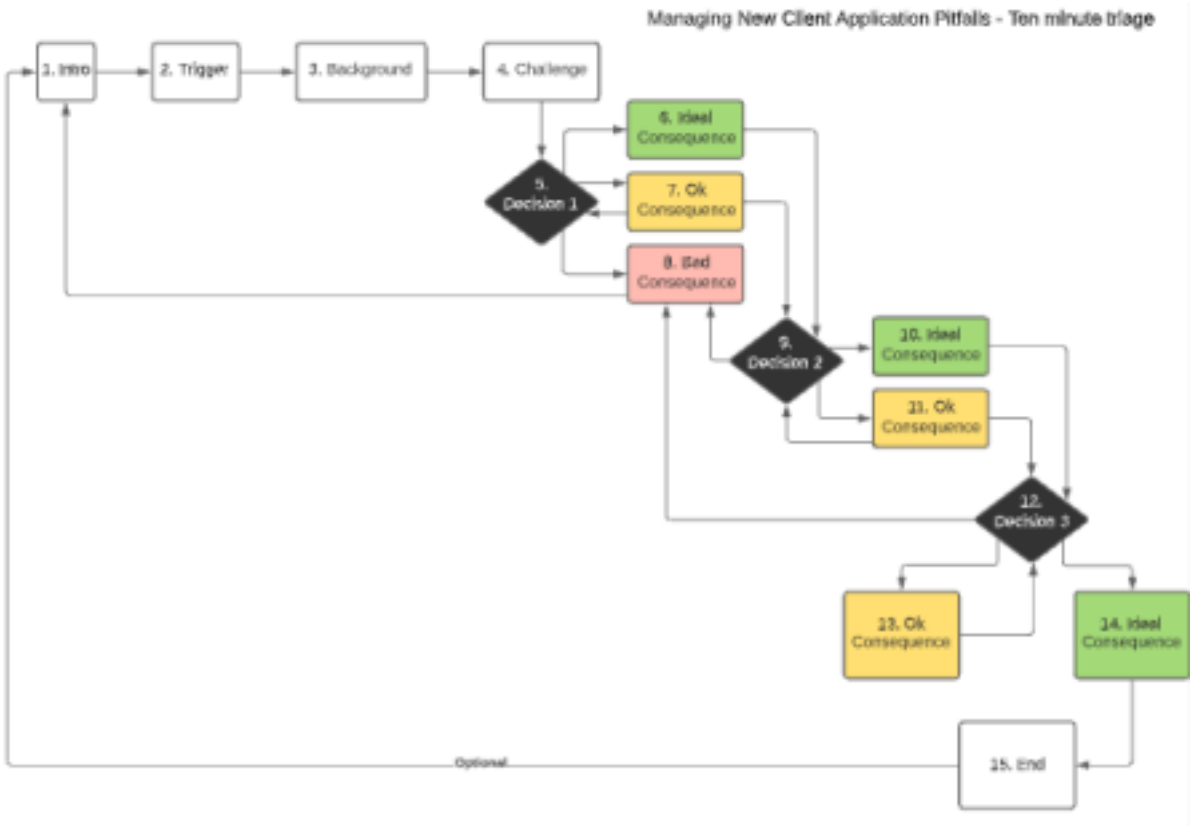
Guidance techniques

- Feedback provided after each decision
- Reflection questions are applied to “ok” outcomes
- Interface options allow a learner to return to the previous decision and retry after an “ok” outcome
  - “Bad” outcomes ask the learner to return to the beginning and review the training goals

Advisor type (if any)

Not applicable

Branching scenario path (i.e., flowchart)



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E-Learning structure/content outline

Managing New Client Application Pitfalls

Lesson One: Ten minute triage

Introduction

Screen 1: Title and objective

Screen 2: Trigger event - client calls learner

Screen 3: Background information for the scenario

Screen 4: Challenge - Ten minute review of an application for major errors and guide a client through the process

Decision 1

Screen 5: Choose how to identify requested certification services

- **Ideal path - Screen 6:** Example of catching an error and communicate findings (Proceed to #9)
- **Ok path - Screen 7:** See how some effort to catch an error may or may not produce results (Option to proceed to #9 or return #5 to try again)
- **Bad path - Screen 8:** Restart and review objective in title screen (Return to #1)

Decision 2

Screen 9: Choose how to review application and match to requested services

- **Ideal path - Screen 10:** Example of breaking down the services and match to the application modules (Proceed to #12)
- **Ok path - Screen 11:** See how some effort to match services to the application may or may not produce results (Option to proceed to #12 or return to #9)
- **Bad path - Screen 8:** Restart and review objective in title screen (Return to #1)

Decision 3

Screen 12: Choose how to end the call

- **Ok path - Screen 13:** Offer to answer questions (proceed to #15 or return to #12)
- **Ideal path - Screen 14:** Summarize the conversation and offer to answer questions with feedback from mentor on why the decision was ideal (proceed to #14)
- **Bad path - Screen 8:** Restart and review objective in title screen (Return to #1)

Outro

Screen 15: Conclusion (Option to restart lesson)

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Training design matrix

The Training Design Matrix provides an overview of each proposed module/lesson within the training including objectives, lesson topics, instructional strategies, assessment strategies and practical exercises. Please complete one matrix template below per lesson (this will require you to cut and paste a matrix for each lesson and complete one matrix per lesson). You will likely need multiple modules for a 1 - 3 hour training while you may only need one module for a 10-minute e-learning object.

Management New Client Application Pitfalls

● **Scope statement:** Train learner to identify steps in checking a new client application ● **Terminal Learning Objective (TLO):** Given a new client application, analyze paperwork for major errors within five to ten minutes.

● **Enabling Learning Objectives (ELO):**
  ○ Identify the requested services in the client documentation
  ○ Verify the services match the type of information submitted within the application ○ Communicate findings to client (ask questions if requested services does not match the application)

● **Lesson Topics:**
  ○ Ten minute triage
  ○ **Instructional Strategy:** Analyze details in a new client application. Decisions are within the context of a phone call with a new client. The learner responds to client questions and cues for each decision in the process to triage a new application. ○ **Assessment Strategy:** Not applicable

Estimated contact time

Lesson 1: Ten minute triage

● **Intro/Summary/Objective (min.):** 3 screens - .5 min per screen (1.5 min total) ● **Content (min.):** 7 screens - 2 min per slide (14 min total for ideal-ok paths) ● **Knowledge Check (KC)/Practical Exercises (PE) Screens (min.):** 5 screens - 2 min per slide (10 min total)

● **Total Screens/Minutes:** 15 screens, 25.5 min maximum

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