

Course: Basic Account Maintenance in SCORE

Overview: Technical training for intermediate call center employees at a large financial services firm. SCORE is a fictional application based on the real in-house software used for this training (which is behind an NDA). Employees have previously performed maintenance on client accounts in SCORE in response to phone calls, but they will now be updating accounts in SCORE based on written requests routed to them via Appian.

Modality: Blended Learning: Virtual Instructor Led Training and eLearning

Duration: 4.25 hours

Audience: 15-25 employees per session, intermediate workstream, Client Services Representatives

Delivery: Microsoft Teams, SAP Success Factors LMS, SCORE Training environment, Appian, internal Confluence 'techwiki'

Prior Knowledge: Receiving client calls, answering questions in writing. NOT making changes to accounts based on written requests.

Accessibility Considerations	
vILT	eLearning
Captions are enabled during the Microsoft Teams portion Reach out beforehand to see if anyone requires accommodations Class material provided to learners ahead of time One task per slide to reduce cognitive load Request samples showcase diverse representation amongst clients - ages, genders, races, etc.	All visuals meet color contrast ratios Alt-text on all images All interactions can be done with keyboard Closed Captions included for voice overs Avoids GIFs and excessive flashing that can trigger medical reactions Focus order and heading hierarchy will be used

Course Flow	Objectives	Development	Status
Module 1	Getting Started .5 hours		<input type="checkbox"/> Facilitator Guide
1 Course Overview	Wrapping	presentation .08 hours Share agenda and objectives Set expectations for training	<input type="checkbox"/> Make slide deck <input type="checkbox"/> Save in doc library
2 Introductions	Wrapping	icebreaker .17 hours Facilitator introduces themselves Learners each share how they will use the new skills acquired in this training	<input type="checkbox"/> Write intro
3 Prior Knowledge Poll	Wrapping	poll .08 hours Create poll asking: On a score of 1-5, how comfortable are you with basic account maintenance? 1- Nothing 5- Expert	<input type="checkbox"/> Set up poll in Microsoft Teams
4 Systems Login	Learners will be able to... <ul style="list-style-type: none"> access SCORE Training 	SCORE Training .17 hours Distribute login/passwords for SCORE Training environment Make sure everyone is logged in Troubleshoot	<input type="checkbox"/> Prep test IDs <input type="checkbox"/> Add IDs to slide deck

Course Flow	Objectives	Development	Status
Module 2	Account Maintenance - Concepts 1 hour		<input type="checkbox"/> Facilitator Guide
1 Resource Review	Learners will be able to... <ul style="list-style-type: none"> • apply information from job aids while performing 	investigation .17 hours Review 2 job aids in techwiki <ul style="list-style-type: none"> • <i>Account Maintenance Requirements</i> • <i>Approved Documentation</i> Share key takeaways on digital whiteboard	<input type="checkbox"/> Set up digital whiteboard
2 Demonstration	Learners will be able to... <ul style="list-style-type: none"> • read and interpret incoming requests 	demonstration .08 hours Facilitator pulls up sample request Model verifying it is in good order using the job aids to answer the following: <ol style="list-style-type: none"> 1. What is being requested? 2. Who is making the request? Are they authorized? 3. Do we have the right documentation? 	<input type="checkbox"/> Create PDF <input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library
3 Read and Interpret Requests	Learners will be able to... <ul style="list-style-type: none"> • determine what requests are asking • identify who is making the request and if they are authorized 	group work .25 hours Breakout rooms View 3 sample requests For each, use the job aids and answer: <ul style="list-style-type: none"> • Is this request in good order to process? • Why or why not? Return to main room and debrief	<input type="checkbox"/> Create PDFs <input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library
4 Analysis activity	Learners will be able to... <ul style="list-style-type: none"> • verify if incoming requests and in good order to process 	eLearning .5 hours Build eLearning using Storyline <ul style="list-style-type: none"> • Learner receives 3 requests, needs to verify if each is 'in good order' Collect text responses using SCORM and review for accuracy Discuss correct answer as a group after	<input type="checkbox"/> Develop eLearning <input type="checkbox"/> QA in Sandbox <input type="checkbox"/> Push to prod <input type="checkbox"/> Create PDFs <input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library

Course Flow	Objectives	Development	Status
Module 3	Account Maintenance - Processing 1.42 hours		<input type="checkbox"/> Facilitator Guide
1 Resource Review	Learners will be able to... <ul style="list-style-type: none"> • apply information from job aids while performing 	investigation .08 hours Review job aids in techwiki <ul style="list-style-type: none"> • <i>Processing Basic Account Maintenance Requests</i> Share key takeaways on digital whiteboard	<input type="checkbox"/> Set up digital whiteboard
2 Demonstration	Learners will be able to... <ul style="list-style-type: none"> • navigate the processing steps in SCORE 	video demo .17 hours In the video, show: <ul style="list-style-type: none"> • Receive request • Process request in SCORE using job aid Facilitator debrief - answer questions	<input type="checkbox"/> Create PDF <input type="checkbox"/> Record/edit video <input type="checkbox"/> Push to prod <input type="checkbox"/> Save in doc library
3 Simulation	Learners will be able to... <ul style="list-style-type: none"> • avoid processing errors in SCORE 	simulation .25 hours Learners take Captivate eLearning that simulates processing a request After, discuss: what do you think are the most common errors? Facilitator share answers from the business	<input type="checkbox"/> Develop eLearning <input type="checkbox"/> QA in Sandbox <input type="checkbox"/> Push to prod <input type="checkbox"/> Create PDF <input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library
4 Practice	Learners will be able to accurately process... <ul style="list-style-type: none"> • a name change • a retirement distribution via check • a change of beneficiary 	practice .75 hours Learners receive 3 requests in SCORE Process requests and submit transactions Facilitator QAs their work Provide video answer key of SME processing each request	<input type="checkbox"/> Create PDFs <input type="checkbox"/> Write answer key <input type="checkbox"/> Record/edit videos <input type="checkbox"/> Push to prod <input type="checkbox"/> Save in doc library
5 Debrief	Learners will be able to... <ul style="list-style-type: none"> • recognize the importance of processing correctly 	reflection .17 hours What are the impacts of processing incorrectly?	<input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library

Course Flow	Objectives	Development	Status
Module 4	NIGO (Not In Good Order) Requests 1 hour		<input type="checkbox"/> Facilitator Guide
1 NIGO Process	Learners will be able to... <ul style="list-style-type: none"> map out the process for NIGO requests 	infographic .08 hours Review visual that shows process for handling NIGO requests Flow chart that shows different routing/referral/outbound call options	<input type="checkbox"/> Create visual <input type="checkbox"/> Save in doc library
2 Resource Review	Learners will be able to... <ul style="list-style-type: none"> apply information from job aids while performing 	investigation .08 hours Review job aids in techwiki <ul style="list-style-type: none"> <i>NIGO Procedures</i> Record questions they have from the infographic or job aids on digital whiteboard	<input type="checkbox"/> Set up digital whiteboard
3 Ask an Expert	Learners will be able to... <ul style="list-style-type: none"> clarify misconceptions about NIGO requests 	Q&A .17 hours Learners ask questions they have about the process for routing/referring NIGO cases	<input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library
4 Demonstration	Learners will be able to... <ul style="list-style-type: none"> navigate the NIGO procedures in SCORE 	video demo .17 hours In the video, show: <ul style="list-style-type: none"> Receive NIGO request Process request in SCORE using job aid Facilitator debrief - answer questions	<input type="checkbox"/> Create PDF <input type="checkbox"/> Record/edit videos <input type="checkbox"/> Push to prod <input type="checkbox"/> Save in doc library
5 Practice	Learners will be able to... <ul style="list-style-type: none"> refer a NIGO request to the help desk route a NIGO request to the advanced workstream tag a suspicious request for legal 	practice .5 hours Learners receive 3 NIGO requests in SCORE Process requests and submit transactions Facilitator QAs their work Provide video answer keys of SME processing each request	<input type="checkbox"/> Create PDFs <input type="checkbox"/> Write answer key <input type="checkbox"/> Record/edit videos <input type="checkbox"/> Push to prod <input type="checkbox"/> Save in doc library

Course Flow	Objectives	Development	Status
Module 5	Wrap Up .33 hours		<input type="checkbox"/> Facilitator Guide
1 Confidence check	Wrapping	<p>poll .08 hours Ask the question: How confident are you handling processing requests?</p> <ul style="list-style-type: none"> • 1- Not at all • 5- Very <p>Discuss responses in the next activity</p>	<input type="checkbox"/> Set up poll in Microsoft Teams
2 Discussion	Wrapping	<p>wrap up discussion .17 hours Facilitator guides discussion:</p> <ul style="list-style-type: none"> • What resources will you use when handling this worktype on the floor? • What do you think will be most challenging about processing? 	<input type="checkbox"/> Write answer key <input type="checkbox"/> Save in doc library
3 Course certification	Wrapping	<p>eLearning .08 hours Learners certify that they completed the course in the LMS This credential is linked to their promotion</p>	<input type="checkbox"/> Create eLearning <input type="checkbox"/> QA in Sandbox <input type="checkbox"/> Push to prod <input type="checkbox"/> Save in doc library

Evaluation	
30 days	60 days
<p>Capture quality data from reinforcement period If performing under 88% accuracy, direct coaching by manager Email campaign with scavenger hunt for important details in the job aids</p>	<p>Capture quality data again Cohort's goal is 90%, for average under 90% perform data analysis</p> <ul style="list-style-type: none"> • Is it just typos and common errors? • Is it a certain type of request? • Was this error covered in our training?