
Instructional Design Plan

**From Member to Loyal
Fan in Five Steps | AAFP
CARES**

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Goal Statement and Main Steps

A. Overview of Training Initiative

This 2.5-hour workshop is designed to prepare Member Service Representatives from the American Association Financial Planners (AAFP) to show empathy when solving member issues. Empathy is one of five customer service skills from the CARES (Communication, Accountability, Responsiveness, Empathy, Solutions) model. All five areas will be covered in separate trainings.

B. Goal Statement

Membership department staff will show empathy during customer service telephone calls, emails and in-person communications.

C. Learning Domain

Use	Domain	Rationale
	Verbal Information	
X	Intellectual Skills	Requires learning a set of approaches to use empathy when solving member problems.
	Psychomotor Skills	
	Attitudes	

D. Main Steps

1.	2.	3.	4.	5.
View the issue from the member's perspective.	Describe the value of empathy over sympathy and apathy in a customer service context.	Decrease distractions in order to focus on the member issue.	Listen to the member to understand the issue they are experiencing.	Verbally acknowledge the member's issue.

Goal Analysis

Main Step # 1: View the issue from the member's perspective.

- Identify empathy
- Identify sympathy
- Identify apathy
- Distinguish empathy from sympathy and apathy
- Recall a customer service experience
- Deduce how you would feel if you were in this customer service situation

Main Step #2: Describe the value of empathy over sympathy and apathy in a customer service context.

Main Step #3: Decrease distractions in order to focus on the member issue

- Identify internal distractions
- Identify external distractions
- Minimize internal distractions
- Minimize external distractions
- Recognize the importance of focusing on the member

Main Step #4: Acknowledge the member's issue.

- Rephrase the issue in order to confirm understanding

Main Step #5: Listen to the member to understand the issue they are experiencing.

- Demonstrate active listening skills
- Demonstrate deferring judgment of customer
- Demonstrate deferring judgment of customer's issue

Things Learners Should Already Know or Know How to Do

- Ability to sense other people's emotions
- Ability to imagine what someone else is feeling
- Communicate in a professional manner verbally, in writing and in-person
- Novice knowledge of the Customer Management System
- Novice customer service skills

Learner Analysis

Information Categories	Data Sources	Learner Characteristics
1. Entry behaviors	<p>Interviews: Customer Service Representatives</p> <p>Interview: Member Service Director (supervisor)</p>	<p>About half (5) the learners have five or more years experience in their current roles. Due to a recent organizational restructure, the other half (5) of the customer service representatives have been in their positions less than two months, but all have previous customer service experience. There was no formal onboarding process or training for any of the employees. Informal peer mentoring has been the main form of learning.</p>
2. Prior knowledge of topic area	<p>Questionnaires: Customer Service Representatives</p> <p>Observation: Customer Service Representatives</p>	<p>Learners do not differentiate empathy from sympathy. They are professional, but not personable in their customer interactions. They are able to imagine and sense other people's emotions.</p>
3. Attitudes toward content	<p>Questionnaires: Customer Service Representatives</p> <p>Interviews: Customer Service Representatives</p> <p>Interview: Member Service Director (supervisor)</p>	<p>Due to low member survey scores regarding customer service, learners want to improve, but they are unsure about the specific skills they need to do so. There is a little resistance to change for the learners that have been employed for eight years or more, but it is not a deeply engrained sentiment.</p>
4. Attitudes toward potential delivery system	<p>Interviews and Questionnaires: Customer Service Representatives</p>	<p>Learners have a variety of training experiences from previous jobs. They are interested in classroom-based training, enjoy learning from their peers and want a break from their computers. The</p>

		Member Services Director thought it was important for everyone to attend training simultaneously, so she gave the learners a choice of when to attend. In order to continue to serve members during work hours, they chose training after work with a meal being served.
5. Motivation for instruction (ARCS)	Interviews: Customer Service Representatives	Learners are eager to increase member satisfaction scores. Some of the veteran learners do not think training is the only challenge facing the department. They are working with the director on CMS and computer upgrades.
6. Educational and ability levels	Interviews: Customer Service Representatives Interview: Member Service Director (supervisor) Questionnaires: Customer Service Representatives	All the learners have at least an associate's degree, one-third have undergraduate degrees. They are able to understand the concepts and importance of the skill(s). Their verbal, written and in-person communication skills are at the intermediate level. On average their familiarity with the CMS is at the intermediate to advanced levels.
7. General learning preferences	Questionnaires: Customer Service Representatives	The learners overwhelmingly agree that the training needs to "keep it real". They want to learn skills they can apply right away, delivered in an engaging manner.
8. Attitudes toward training organization	Interviews: Customer Service Representatives Interview: Member Service Director (supervisor)	The learners are invigorated by the organizational restructure and new CEO's vision for improving the organization. They value members and want to be a part of the organization's success.

<p>9. General group characteristics</p>	<p>Interviews: Customer Service Representatives</p> <p>Interview: Member Service Director (supervisor)</p> <p>Questionnaires: Customer Service Representatives</p> <p>Observation: Customer Service Representatives</p>	<p>Heterogeneity: Learners are heterogeneous in age, gender and cultural backgrounds. They have diverse types and amounts of customer service experience.</p> <p>Size: There will be ten learners in the class; all of the customer service representatives will be present. However, the organizational restructure will require all staff to be trained in the CARES program in the future, as member ambassadors. The possibly in a different format depending on the learner analysis for those trainings.</p> <p>Overall impressions: Instruction will need to be engaging and interactive. The learners are enthusiastic about learning and using new skills to improve membership service.</p>
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Performance Objectives

Step	Matching Performance Objective
<p>1: View the issue from the member's perspective.</p> <p>1.1 Recall a customer service experience</p> <p>1.2 Deduce how you would feel if you were in this situation</p> <p>1.3 Identify empathy</p> <p>1.4 Identify sympathy</p> <p>1.5 Identify apathy</p> <p>1.6 Differentiate between empathy, sympathy and apathy in a customer service context.</p>	<p>Using selected examples from the personal experiences as a customer activity, identify empathetic, sympathetic or apathetic responses in three of the four examples.</p>
<p>2: Describe the value of empathy over sympathy and apathy in a customer service context.</p>	<p>Using selected examples from the personal experiences as a customer activity, describe the value of empathetic responses over sympathetic and apathetic ones in three of four samples.</p>
<p>3: Listen to the member to understand the issue they are experiencing.</p> <p>3.1 Demonstrate active listening skills</p> <p>3.2 Demonstrate deferring judgment of customer</p> <p>3.3 Demonstrate deferring judgment of customer's issue</p>	<p>Given a customer service role play, demonstrate paying attention, listening and deferring judgment at least twice.</p>

<p>4: Decrease distractions in order to focus on the member issue</p> <p>4.1 Identify internal distractions</p> <p>4.2 Identify external distractions</p> <p>4.3 Minimize internal distractions</p> <p>4.4 Minimize external distractions</p> <p>4.5 Recognize the importance of focusing on the member</p>	<p>In a distraction-filled customer service role play scenario, apply at least two internal and external distraction minimization techniques while communicating with a member.</p>
<p>5: Acknowledge the member's issue.</p> <p>5.1 Demonstrate verbal member advocacy phrases.</p> <p>5.2 Rephrase the issue in order to confirm understanding.</p>	<p>Given a customer service role play, the learner will use at least one issue rephrasing response to demonstrate acknowledgement of the member's problem.</p>

Assessment Plan

Performance Objective	Parallel Test Item
<p>1. Using selected examples from the personal experiences as a customer activity, identify empathetic, sympathetic or apathetic responses in three of the four examples.</p>	<p>There are different types of responses to customers. These responses can be empathetic, sympathetic or apathetic.</p> <p><i>Empathetic:</i> the feeling that you understand and share another person’s experiences and emotions: the ability to share someone else’s feelings.</p> <p><i>Sympathetic:</i> the feeling that you care about and are sorry about someone else’s trouble, grief, misfortune.</p> <p><i>Apathetic:</i> the feeling of not having much emotion or interest.</p> <p>Use the definitions above to help you identify what type of response was shared in the customer service example you will be given. Your team will have one minute to choose the correct definition.</p> <p>If your guess is incorrect, the other team will have a minute to discuss options and answer.</p> <p>A total of four customer service examples will be used for this activity. A bonus question will be asked each time a team answers correctly, giving that team another chance to rack up points.</p> <p>The team with the most points at the end of the game will win a small prize.</p>
<p>2. Using selected examples from the personal experiences as a customer activity, describe the at least three benefits of empathetic responses over sympathetic and apathetic ones.</p>	<p>Bonus questions asked by the facilitator:</p> <ol style="list-style-type: none"> 1. What is a benefit of responding empathetically to a customer? 2. What is a benefit of responding empathetically to a customer that hasn’t been mentioned yet? 3. Describe a good situation to use apathy? 4. Can sympathy be useful in customer service situations?

<p>3. In a distraction-filled customer service role play scenario, apply at least two internal and external distraction minimization techniques while communicating with a member.</p>	<p>As you observe <u>(name)</u> respond to the customer, list the actions she/he took to minimize distractions?</p> <table border="0"> <thead> <tr> <th style="text-align: left;"><u>Action</u></th> <th style="text-align: left;"><u>Frequency</u></th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td>_____</td> </tr> <tr> <td>2. _____</td> <td>_____</td> </tr> <tr> <td>3. _____</td> <td>_____</td> </tr> <tr> <td>4. _____</td> <td>_____</td> </tr> <tr> <td>5. _____</td> <td>_____</td> </tr> <tr> <td>6. _____</td> <td>_____</td> </tr> </tbody> </table>	<u>Action</u>	<u>Frequency</u>	1. _____	_____	2. _____	_____	3. _____	_____	4. _____	_____	5. _____	_____	6. _____	_____
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<p>4. Given a customer service role play, demonstrate paying attention, listening and deferring judgment at least twice.</p>	<p>As you observe <u>(name)</u> respond to the customer, what actions did she/he to display focus on the customer?</p> <table border="0"> <thead> <tr> <th style="text-align: left;"><u>Action</u></th> <th style="text-align: left;"><u>Frequency</u></th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td>_____</td> </tr> <tr> <td>2. _____</td> <td>_____</td> </tr> <tr> <td>3. _____</td> <td>_____</td> </tr> <tr> <td>4. _____</td> <td>_____</td> </tr> <tr> <td>5. _____</td> <td>_____</td> </tr> <tr> <td>6. _____</td> <td>_____</td> </tr> </tbody> </table>	<u>Action</u>	<u>Frequency</u>	1. _____	_____	2. _____	_____	3. _____	_____	4. _____	_____	5. _____	_____	6. _____	_____
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<p>5. Given a sample email, the learner will use at least one member advocacy phrase and one issue rephrasing response to demonstrate acknowledgement of the member's problem.</p>	<p>Read the sample email below. Write a response to the customer that shows you support her and understand the problem below.</p> <p><u>Sample Email</u></p> <p>To: Customer Service, AAFP From: Gayle Johnson Date: March 22, 2017, 01:45a.m.</p> <hr/> <p>TO WHOM IT MAY CONCERN:</p> <p>This is the THIRD email I've sent! I need confirmation of my registration TODAY! I can't get reimbursed from my job without it. \$650 isn't nothing you know! I cannot believe I pay dues to this organization. I will be contacting the CEO if I don't get a response this time!!!!</p>														

	<p>Gayle Johnson Director Financial Analysis Eagle Financial Services 444.777.9311</p> <p>“We give your financial dreams wings.”</p> <p><u>Your Response</u></p> <p>.</p>
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Instructional Strategy

PREINSTRUCTIONAL ACTIVITIES

MOTIVATION:

Learners have already participated in a CARES initiative kickoff party. They are aware the membership survey results point to negative feelings about customer service. The CEO spoke to the group about their accomplishments as well as the importance of their role in retaining and recruiting members.

Attention will be gained during the session through a preinstructional activity. Each Membership Service Representatives (MSR) will:

- 1) Interview one other MSR.
- 2) Relay their best customer service experience as a customer while their partner will be interviewed about their worst customer service experience from a customer perspective.
- 3) Introduce his or her interviewees and stories.

The facilitator will:

- 1) Capture a summary of the stories to display for a future activity
- 2) Refer to the experiences as customers to facilitate a brief discussion about the way MSRs' want members to feel after an interaction with membership staff and why they think those reasons are important. This information and the stories from the customer perspective will be referred to throughout the training.
- 3) Discuss class objectives using feedback from discussion and learner expectations as reference points.

ASSESSMENT

PRETESTS:

All learners will complete a progress tracking sheet created using training objectives three weeks before training. The sheets will be used to adjust training if needed.

POSTTESTS:

All learners will complete a progress tracking sheet created using training objectives, directly following the training. The post training progress tracking sheet will be used to assess learning and the effectiveness of the training.

FOLLOW-THROUGH ACTIVITIES

Completed progress tracking sheets will be reviewed by MSRs to inform the development of their personal improvement plan. A section of the personal improvement plan will be developed by the MSRs after each CARES training session and will be used as individual performance improvement tools, which align with organizational strategic goals and objectives.

MSRs will receive laminated memory aids that can be displayed in their cubicles if they need to recall the main steps learned in the trainings.

PERFORMANCE OBJECTIVES SUBORDINATE TO MAIN STEPS 1- 2

Objective 1: Using selected examples from the personal experiences as a customer activity, identify empathetic, sympathetic or apathetic responses in three of the four examples.

Objective 2: Using selected examples from the personal experiences as a customer activity, describe the at least three benefits of empathetic responses over sympathetic and apathetic ones.

Content Presentation

There are three categories of responses in customer interactions: empathetic, sympathetic or apathetic. Each type of response elicits different reactions from members. In order to choose the most appropriate response, each one needs to be defined and its value recognized.

Facilitator will:

- 1) Foster a brief group discussion about empathetic, sympathetic and apathetic definitions on the worksheet
- 2) Foster a group discussion to explore the pros and cons of each type of response
- 3) Add any missing information and reinforce current knowledge
- 4) Create a bullet point summary of main points will be captured on oversized post it notes
- 5) Act as a “game show host” and scorekeeper for the “Family Feud” customer service response identification game
- 6) Ask bonus follow up questions
- 7) Provide small prizes for the winning team

Student Participation

MSR's will:

- 1) Participate in a “Family Feud” type game where two teams will compete to identify the type of responses customers received in five of the customer service examples from the preinstructional activity

- 2) Use a handout with definitions of each type of response to guide identification of empathetic, sympathetic or apathetic responses from the customer service examples
- 3) Confer with teammates to choose the best answer
- 4) If they choose an incorrect answer the other team gets to answer
- 5) Given a time limit the team that answers correctly will identify how empathetic responses would be beneficial in the example for bonus points A worksheet will be available for the team to write their responses during their discussion

Feedback

Facilitator will:

- 1) Respond affirmatively to correct answers
- 2) Ask the MSRs for feedback on incorrect answers using bonus questions
- 3) Provide answers if the teams cannot supply them

PERFORMANCE OBJECTIVES SUBORDINATE TO MAIN STEP 3

Objective 3: Given a customer service role play, demonstrate paying attention, listening and deferring judgment at least twice.

Content Presentation

Active listening is integral to displaying and ultimately feeling empathy for a member's issue. Focusing on what the customer is saying, listening and deferring judgment are imperative to active listening.

Facilitator will:

- 1) Ask MSRs why feeling like you are being heard is important
- 2) Ask MSRs how they knew they were being heard during the preinstructional activity interview from the beginning of the training
- 3) Develop a written bullet point summary of main points to be displayed during the presentation.
- 4) Facilitator and group will discuss and add any missing information to the summary
- 5) Introduce the role play activity

Student Participation

MSRs will:

- 1) Use a detailed customer service role play scenario to practice their responses in order to demonstrate understanding and active listening with a partner for a few minutes
- 2) One pair group will perform their role play for the group.

Feedback

Facilitator will:

- 1) Offer positive and corrective feedback during and after the role plays.
- 2) Collect completed observation forms
- 3) Facilitate feedback discussion

MSRs will:

- 1) Complete an observation form during the role play documenting what and when the requested skills are performed
- 2) Offer brief verbal feedback to the role players. A brief wrap up of main points will conclude the discussion

PERFORMANCE OBJECTIVES SUBORDINATE TO MAIN STEP 4

Objective 4: In a distraction-filled customer service role play scenario; apply at least two internal and external distraction minimization techniques while communicating with a member.

Content Presentation

In order to actively listen to members, it's important to be able to focus on the information they are conveying. Whether it's email or wondering what you're cooking for dinner, distractions can impact one's ability to focus on what the member is conveying. Some distractions are external and some are internal. The good news is both internal and external can be managed in order to focus attention on, listening to and conveying empathy to members.

The facilitator:

- 1) Asks the group to list internal and external distractions on individual index cards; one pile for internal and the other for external
- 2) Asks for volunteers to pull completed index cards and read them
- 3) Requests suggestions to diminish some of the distractions on the post cards
- 4) Writes bullet point summary of main points as the group discusses
- 5) Suggests missing information Note: MSRs can refer to this bulleted list during their role play practice
- 6) Introduces the less detailed role play activity
- 7) Provide three distractions for each role play
- 8) Facilitates post

Student Participation

MSRs will:

- 1) Participate in the discussion outlined above.
- 2) Participate in role play scenarios minimizing distractions and focusing on the customer, in pairs
- 3) One pair will perform the role play
- 4) Help provide distractions for performed role play

Feedback

Facilitator will:

- 1) Offer positive and corrective feedback during and after the role play.
- 2) Collect completed observation forms
- 3) Facilitate feedback discussion
- 4) Facilitate a brief wrap up of main points will conclude the discussion

MSRs will:

- 1) Complete an observation form during the role play documenting what and when the requested skills are performed
- 2) Offer brief verbal feedback to the role players.

PERFORMANCE OBJECTIVES SUBORDINATE TO MAIN STEP 5

Objective 5: Given a sample customer service email, the learner will use at least one issue rephrasing response to demonstrate acknowledgement of the member's problem.

Content Presentation

Conveying empathy can be as simple as acknowledging the issue and assuring the member their issue is valid and they are valued. How this conversation is conveyed could mean the difference between the member feeling patronized or feeling empathy.

Facilitator will:

- 1) Request that MSRs recall a positive email communication they have had with a dissatisfied member.
 - 2) Inquire how the member knew they understood their issue
 - 3) Reiterate and highlight responses that involve rephrasing response to demonstrate acknowledgement or member advocacy phrases
 - 4) Facilitate a brief discussion on what these types of phrases accomplish
 - 5) Share verbal examples of rephrasing and advocacy phrases
 - 6) Introduce the sample email activity
 - 7) Facilitate a discussion on lessons learned
- Note: Mention this technique should be used verbally as well

Student Participation

MSRs will:

- 1) Participate in the discussion above
- 2) Complete the sample email response activity sheet outlined above in section 5 in three groups of three participants (one group will have four members)
- 3) Share their responses and insights with the entire group

Feedback

Facilitator will:

- 1) Offer verbal positive and corrective feedback after the sample emails have been shared with the larger group.
- 2) Collect completed activity sheets for assessment purposes

MSRs will:

- 1) Offer verbal positive and corrective feedback after the sample emails have been shared with the larger group.