Instructional Design Plan

Member Services Communication Improvement Training (MSCIT)

Niké Basurto

Contents

Section 1: Project Overview/Purpose

Members are the core of any association. Until a decade ago associations were the only consistent source for member education, research and advocacy. Private companies have been quietly encroaching on the education and research arms of associations, resulting in lower recruitment and retention rates. Lower recruitment and retention rates lead to loss of dues and non-dues revenue and ultimately organizational downsizing or elimination. The American Financial Investors Association is facing these possibilities and has developed a strategy to meet, exceed and anticipate member needs through a comprehensive organizational culture change and services overhaul.

Following analysis of organizational operations, focus groups, interviews and surveys of members and staff, several strategies and trainings have been developed to recruit and retain American Financial Investors Association (AFIA) members. One very apparent issue that emerged from the analysis was low membership services satisfaction scores. It was determined that a comprehensive training was needed to improve communication with members.

The Member Services Communication Improvement Training (MSCIT) will build on the current written and verbal communication skills of staff, as well as introduce new skills and approaches in order to significantly improve how staff view, interact and problem solve with members. Based on the organizational assessment and current research, improved member experiences in conjunction with other changes outlined in the strategic plan, are expected to lead to increased member retention and recruitment.

Section 2: Target Audience

This e-learning module is designed for membership department employees. About half of the membership services department employees are new hires and half are seasoned membership services professionals who have been with the organization three years or more. The new hires are enthusiastic about the mission and member services. The seasoned membership professionals are dedicated to the organization and are used to the old way of doing things but are mostly interested in changing for the good of the organization. Many of their colleagues have been reassigned or released from the organization for many reasons, so they are eager to prove their value. Both groups are diverse in age, experience, gender and race. Please note, that a pared down version of this training will be integrated into the onboarding process for all staff and development of current staff as the organization moves toward all employees acting as member "ambassadors".

Section 3: Project Stakeholders and SMEs

3.1: Project Stakeholders & Roles

Stakeholder	Title	Role in Project
Kiman Hannah	Board of Directors President	Communicates progress to the Board
Kyreh Cheatom	Executive Director	General oversight of process. Plan approval. Project sponsor.
Ernestine Caradine	Chief Financial Officer	General oversight of budget. Budget approval
Tammy McCann	Membership Committee Chair	Represents membership concerns and expectations. Receives updates.
Akanke Mahon	Membership Director	Training development, implementation and evaluation input. Quality assurance.
Niké Basurto	Instructional Designer	Designs and develops learning and evaluation
Adenike Orimaya	Trainer	Training design input, quality assurance.

3.2: Subject Matter Experts (SMEs)

Subject Matter Expert	Role
Membership Staff Representatives	Analysis and Focus Group Members
Membership Director	Analysis Phase and Development Input
Membership Consultant	Analysis and Quality Assurance

Section 4: Design

4.1: Learning Objectives

High-Level Objectives

At the conclusion of the Member Services Communication Improvement Training (MSCIT) program, membership department employees will be able to:

- Identify the connection between member communication quality, organizational mission and member satisfaction
- Differentiate between service from non member-focused service and member-focused service
- Apply listening skills
- Apply verbal and written communication skills
- Resolve diverse member issues using problem resolution skills
- Resolve team member issues using communication skills

Detail-Level Objectives

In-Person Workshop Course 1: Program Overview and Communication Skills Action Plan Development
After completing this face-to-face workshop, membership staff will be able to:

- Identify the purpose of the MSCIT program without using workshop handouts
- Summarize their role in the MSCIT program using at least three of the five means outlined
- Explain at least three of the five ways the Communication Skills Action Plan will assist in expanding their communication skills
- Complete 100% of the Communication Skills Action Plan using aid and rubric within seven business days following the workshop

E-learning Module 1: This is How We Do It! : Organizational Mission In Action
After completing this e-learning training, membership staff will be able to:

- Describe at least six of the seven reasons organizational missions are important
- Identify the AFIA mission
- Identify four ways the AFIA mission translates into action
- Critique two out of three ways to demonstrate the mission in action

E-learning Module 2: Serving Up Service: Outstanding Member-Focused Service
After completing this e-learning training, membership staff will be able to:

- Identify five components of member-focused service
- Differentiate between helpful and harmful member-focused service
- Apply member-focused service skills using two of three communication techniques
- Identify three of four member touchpoint opportunities using scenarios

E-learning Module 3: The Power of Positivity: Using Member-Focused Communication

After completing this e-learning training, membership staff will be able to:

- Define positive communication in three of four scenarios using handout
- Differentiate between helpful and harmful communication in three of four scenarios
- Apply communication skills with members and co-workers at an intermediate level

E-learning Module 4: What Did You Just Say: Interpreting and Responding to Member Behaviors

After completing this e-learning training, membership staff will be able to:

- Identify at least three of four ways to interpret member behavior
- Identify at least three of four ways to respond to member behavior
- Apply listening skills at the intermediate level
- Apply response skills at the intermediate level

E-learning Module 5: 'Go Look It Up on the Website' is Not the Answer: Resource Knowledge Management

After completing this e-learning training, membership staff will be able to:

- Identify all four knowledge sharing steps
- Identify all four knowledge capture steps
- Identify importance of knowledge management
- Use knowledge capture steps in the proper order
- Use knowledge sharing steps in the proper order

In-Person Workshop Course 2: Member Support Ninjas: Team Communication and Skill Review

After completing this in-person training, membership staff will be able to:

- Construct responses to scenarios using listening to understand skills
- Apply professional responses to a variety of member behaviors using at least three of six member-focused service techniques
- Distinguish between effective and ineffective team communication in three out of four scenarios
- Apply at least four of five team communication skills techniques using course materials
- Using course materials and activities, identify five of the six ways individual communication action plans can be used for performance enhancement

4.2 Instructional Approach

Branching scenarios and storytelling will be the main instructional approaches used for this course. The story will be told from a membership staff perspective. The learner will help their new co-worker "Samantha" navigate member communication scenarios. The scenarios will focus on member telephone, email and in-person communication. Following the learner responses to the scenarios, explanations of the benefits or challenges the selected choices represent will be used to reinforce learning. A brief quiz will be given at the end of the module in order to assess learning.

Scenario Example

Membership Staff Person (Graphic Image and Narration): "I just received an email from a member who has been waiting for three weeks for his membership to be activated. He seems really angry. I'm forwarding you his email."

The learner will advise his or her co-worker "Samantha" on how to proceed. An image of Samantha and three options appear on the screen:

Samantha (Graphic Image and Narration): "I'm nervous about responding. What should I do?"

First Reaction Choice (Text): Complain to Susana's manager that she doesn't have the right to give you work.

Second Reaction Choice (Text): Contact the potential member immediately and resolve the issue.

Third Reaction Choice (Text): Look up the member's record in the CMS to determine possible issues, and then contact the member to resolve the issue.

Depending on the answer chosen, an image of the member will appear with a facial expression that matches the selection. An explanation for the chosen response will appear with the option to roll over the other to answers to reveal the explanation for those choices as well.

In addition to the e-learning portion of this course, membership staff will also design an individual action plan to improve their member communication skills as they complete the e-learning course. E-learning modules will match categories in the action plan. Each section of the action plan will be completed following the corresponding e-learning module. This process will facilitate knowledge transfer in an individualized manner and offers a way to track progress, which will be beneficial for staff and management. It will also help identify possible gaps in training in order to improve learning when the project is scaled for use in onboarding and training of non-membership department staff. Additional details about action plan used in the evaluation process are outlined in Section 4.7 of this plan.

4.3 Instructional Strategies

Behavioral Strategies	Practice answering member questions. Drag and drop the scenario answers choices into a text area that offers feedback on how that choice impacts the member. Repetition of member responses with feedback. Knowledge check quizzes with immediate feedback will be used to determine if the information was understood and to help the learner determine their level of knowledge acquisition. If less than 80% of the questions were answered correctly on the quiz, the learner will have options to either go back to the instruction page, then answer the questions or to simply answer the questions that were incorrect again.
Cognitive Strategies	Advanced organizers that allow the learner to see an overview and progress through each module will be displayed on each page of the lesson. Each module will be chunked into specific skill sets needed for communication skill acquisition. Text will appear next to graphics to reduce cognitive load. Either audio or text will be used with graphics; never used simultaneously. Graphics will be used to illustrate points. A "replay" button will allow learners to replay the audio after the original audio plays. A rollover option to read the text will be available after the audio plays for clarification if learners prefer reading to audio.
Motivational Principles	Scenarios are directly related to improving a documented challenge for the organization. Scenarios are directly related to improving documented challenges for staff members. Benefits of improved communication with members will be outlined.

	Recognition that some of the skills outlined will reinforce current knowledge, while other aspects will be new, so that learners feel like the e-learning modules will be beneficial for different levels of experience.
	Possible answers will include approaches that have been used by staff previously, but have been updated in order to address the different experience levels of the learners.
	Each module will help staff build their individual communication skills action plan to be shared with their manager, which will be used for professional development purposes.
	The tone and type of text used in responses will be supportive and motivational.
	Points will be allotted for quiz knowledge checks.
	Learners will have control over changes to answers after the first attempt at quizzes and will have the opportunity to return to previously viewed sections during the module.
	The pre- and post- course assessment will be conducted prior to and following the course. This assessment might motivate learners to improve scores.

4.4 Content Input

Content for this project will be derived from:

- Membership staff interviews
- Member focus group
- Member satisfaction survey data
- Customer service SME
- Membership service SME
- Websites
  - https://www.groovehq.com/support/customer-service-training
  - https://www.asaecenter.org/search#?page=1&topics=Member%20Services&sortBy=date&sortOrder=desc
- Books
  - *"The Decision to Join" – How individuals determine value and why they choose to belong*, by James Dalton and Monica Dignam, Association Management Press (August 12, 2007)
  - *Disney U: How Disney University Develops the World's Most Engaged, Loyal, and Customer-Centric Employees*, by Doug Lipp, Disney Editions (March 26, 2013)
  - *Customer Success: How Innovative Companies Are Reducing Churn and Growing Recurring Revenue*, by Nick Mehta, Dan Steinman, Lincoln Murphy, Wiley (February 29, 2016)

4.5 Media Elements

Media elements used in this course will include:

- Text
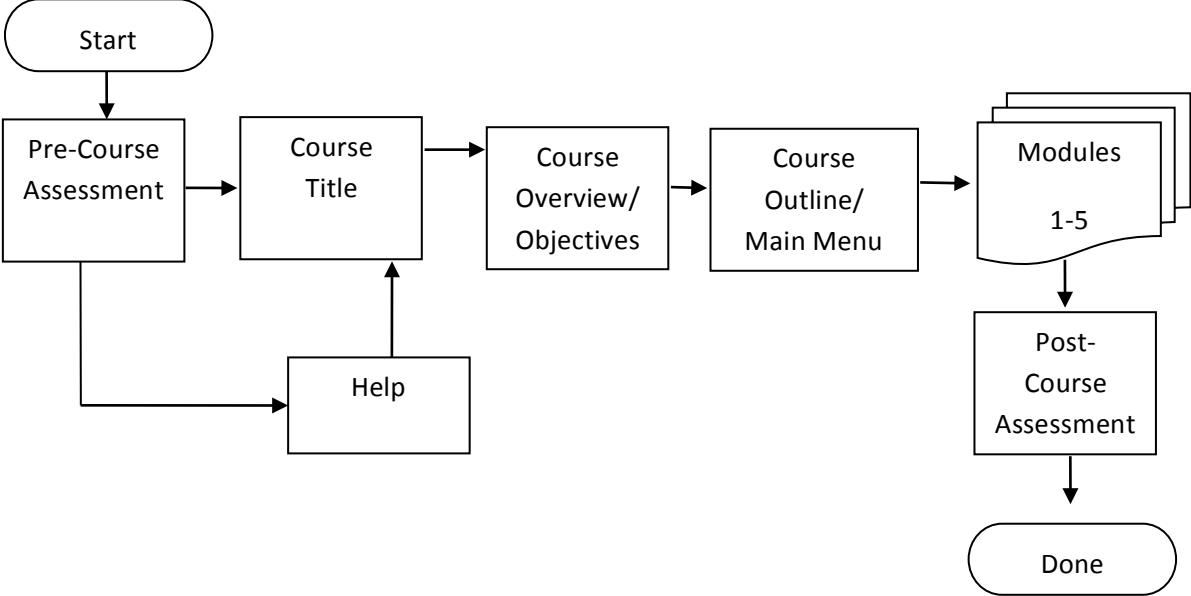- Graphics
- Audio

4.6 Scope and Sequence

MSCIT is designed based on Gagné's Nine Events of Instruction. This approach was chosen due to the level of cognitive reasoning needed to incorporate critical and creative thinking skills needed to communicate and problem solve efficiently and effectively. Learning these skills requires a recall of past experiences, acquisition of new knowledge and the ability to practice the newly acquired skills. Providing feedback and assessment of learning allows for positive reinforcement of the skills and enhances retention and knowledge transfer.

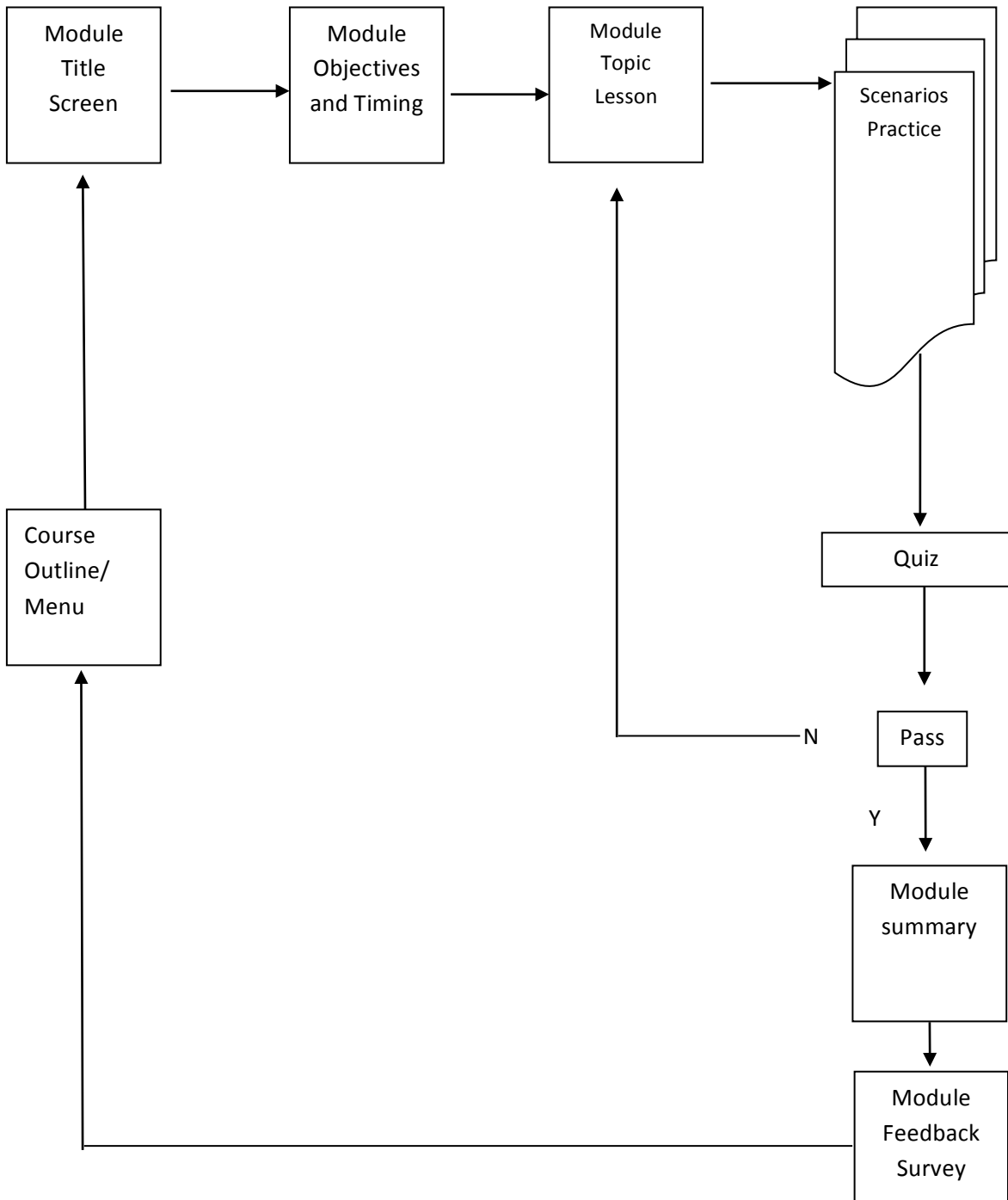| MSCIT Course Sequence Using Gagné's Nine Events of Instruction	
Event of Instruction	**Course Application**
Gain Attention	Member staff avatar will welcome the learner and will outline the benefits of the training for personal development and organizational benefits.
Inform Learners of Objectives	Objectives of the course and module will be outlined on a slide in conversational language.
Stimulate Recall	A connection to the first face-to-face workshop basics of communication conversation and handouts will be conveyed.
Present Content	Content will be presented in branching scenarios where the learner chooses reactions and sees the consequences of their actions in responses to their choices.
Provide Guidance	Each choice will reveal a reason why the choice positively or negatively impacts members and or the organization.
Elicit Performance	Quizzes will be presented at the end of the module to determine knowledge acquired.

Provide Feedback	Learners will have a choice to review rationale for the correct answers.
Assess Performance	Scores will be given at the end of the knowledge check quizzes. A Pre and post course assessment will be conducted.
Enhance Retention and Transfer	Scenarios will be based on real work experiences. Learners will complete individual action plan that corresponds to the e-learning module topics. This action plan will be used commend staff on skills already used and to expand and refine needed communication skills. This document will be refined and monitored with support from the membership manager and L & D staff. Check-ins by L&D staff on goal progress will occur 15, 30 and 45 days following training. More details on the action plans can be found in section 4.7 of this IDP.

Member Services Communication Improvement Training (MSCIT) Course Flow

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   │  Start  │
   └─────────┘
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┌──────────────┐      ┌──────────┐      ┌──────────────┐      ┌──────────────┐      ┌──────────────┐
│ Pre-Course   │─────▶│  Course  │─────▶│   Course     │─────▶│   Course     │─────▶│   Modules    │
│ Assessment   │      │  Title   │      │ Overview/    │      │  Outline/    │      │              │
│              │      │          │      │ Objectives   │      │  Main Menu   │      │    1-5       │
└──────────────┘      └──────────┘      └──────────────┘      └──────────────┘      └──────────────┘
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        │                  │                                                                 ▼
        │             ┌──────────┐                                                  ┌──────────────┐
        └────────────▶│   Help   │                                                  │   Post-      │
                      │          │                                                  │   Course     │
                      └──────────┘                                                  │  Assessment  │
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Member Services Communication Improvement Training (MSCIT) Module Flow

4.7 Evaluation Approach

Used?	Level	Description	How It Will Be Used
Y	**1**	**Reaction**	Surveys will be distributed following the in-person training and will appear at the end of each module to determine if the learner found the knowledge useful, relevant, what worked well and possible improvements. This information will be used to improve future courses and to gauge leaner perception of usefulness in module knowledge.
Y	**2**	**Learning**	Knowledge check quizzes will be used in the e-learning modules to assess learners understanding and ability to use concepts. This will allow the L & D staff as well as the learners to determine what knowledge or skill was gained and what areas need to be revisited in order to aid in the transfer of skills and knowledge to actual work.
Y	**3**	**Transfer**	Interviews with select staff and the membership manager will occur in order to identify opportunities for further development or barriers to skill usage. Each staff member will design an individual action plan to improve their member communication skills as they complete the e-learning course. E-learning modules will match categories in the action plan. Each section will be completed following the corresponding e-learning module. The action plans will be used in a "next steps" activity in the last face-to-face training in order to fine-tune details and reinforce the personal and organizational development value of using them. The membership manager will support staff and review progress toward action plan goals. The L&D evaluation lead will review action plan progress with employees to determine possible additional individual, team or organizational support 15, 30 and 45 days after training ends. This process will help support knowledge transfer in an individualized manner, offer ways to eliminate external barriers that might be impeding success and identify areas to celebrate growth and innovation. Select members will be chosen to present a scenario to staff 45

			days after the training. Staff will not know which calls are real and which ones are scenarios. The manner in which the scenario is handled will be monitored to identify if and to what degree skills are being used in real work scenarios. Support and positive reinforcement will be offered to ensure transfer of knowledge to on the job skills.
Y	4	**Results**	Member surveys are conducted annually. In the past, member satisfaction with service was steadily declined. This data will be used over time to determine increased member satisfaction with member service staff interaction. While the correlation is tangential, new member recruitment cost savings, and retained member dues savings due to improved communication and reputation among members will also be considered in this area of evaluation.

Section 5: Technical Requirements

5.1 Target Platform

The minimum requirements for the target platform(s) that will run your course:

- Screen Size: 1024x600 pixels or larger
- Screen Resolution: Min. 1024x768
- Operating System: Windows XP SP3 and newer, Mac OSX 10.6 and newer
- Computer Speed and Processor: 1GB or RAM and 2GHz processor
- Internet Speed: Minimum of 512kbps
- Updated Adobe Flash Player or QuickTime
- Speakers
- Audio Headphones

Recommended Web browsers

- Google Chrome
- Mozilla Firefox

5.2 Development Tools

- Adobe Captivate 9
- QuickTime Player Version 10.4

- Microsoft PowerPoint for Mac 2011, Version 14.6.4
- Cannon, Digital Photo Editor Professional, Version 3.14.0
- Skillbrains, Lightshot Screenshot, Version 2.17
- E-learning Brothers Images

Section 6: Module Plan and Storyboard

6.1 Lesson Plans

Lesson plans will be developed and approved prior to storyboarding. Lesson plans use the following template:

Objectives	Activities	Assessment	Materials/Inputs
What do they need to know or do?	How will they learn it?	How will we and they know they know they mastered the objective?	Describe the specific materials/inputs needed for the lesson.

6.2 Storyboards

Storyboards will be developed in MS Word using approved storyboard templates. Storyboards will be based on approved lesson plans. Storyboards will be approved prior to production. Separate templates will be used for instructional pages, interaction pages, and quiz/assessment pages. See Section 7 for interface design.

Section 7: Interface Design

7.1 Administrative pages (course control)

Course title, module title, and menu pages are dependent on the course authoring tool chosen. Prototypes of these pages will be developed and approved during course production. The module frame will also include a page counter, formatted as 'Page n of n.'

Used?	Type of Control	Description
	Content Sequencing	Learners can control the order of the modules, topics, and screens within a module.
x	Pacing	Learners can control the time spent on each module page.
x	Access to Learning Support	Learners can control instructional components of modules such as examples or practice exercises. They can control audio replay and rollovers for text to appear on the screen following audio play.
x	Adaptive Control	Learners are directed or branched to different instructional materials in a module based on the program's evaluation of their responses to module exercises.
x	Adaptive Advisement	Learners are given advice as to what actions they should take in a module based on the program's evaluation of their responses to module exercises.

7.2 Interface

A sample of the interface template is below:

From Member to Our Loyal Fan in 5 Steps

Module 1

Module 2

Module 3

Module 4

Module 5

Help   Exit   Back   Next

Page 2 of 10
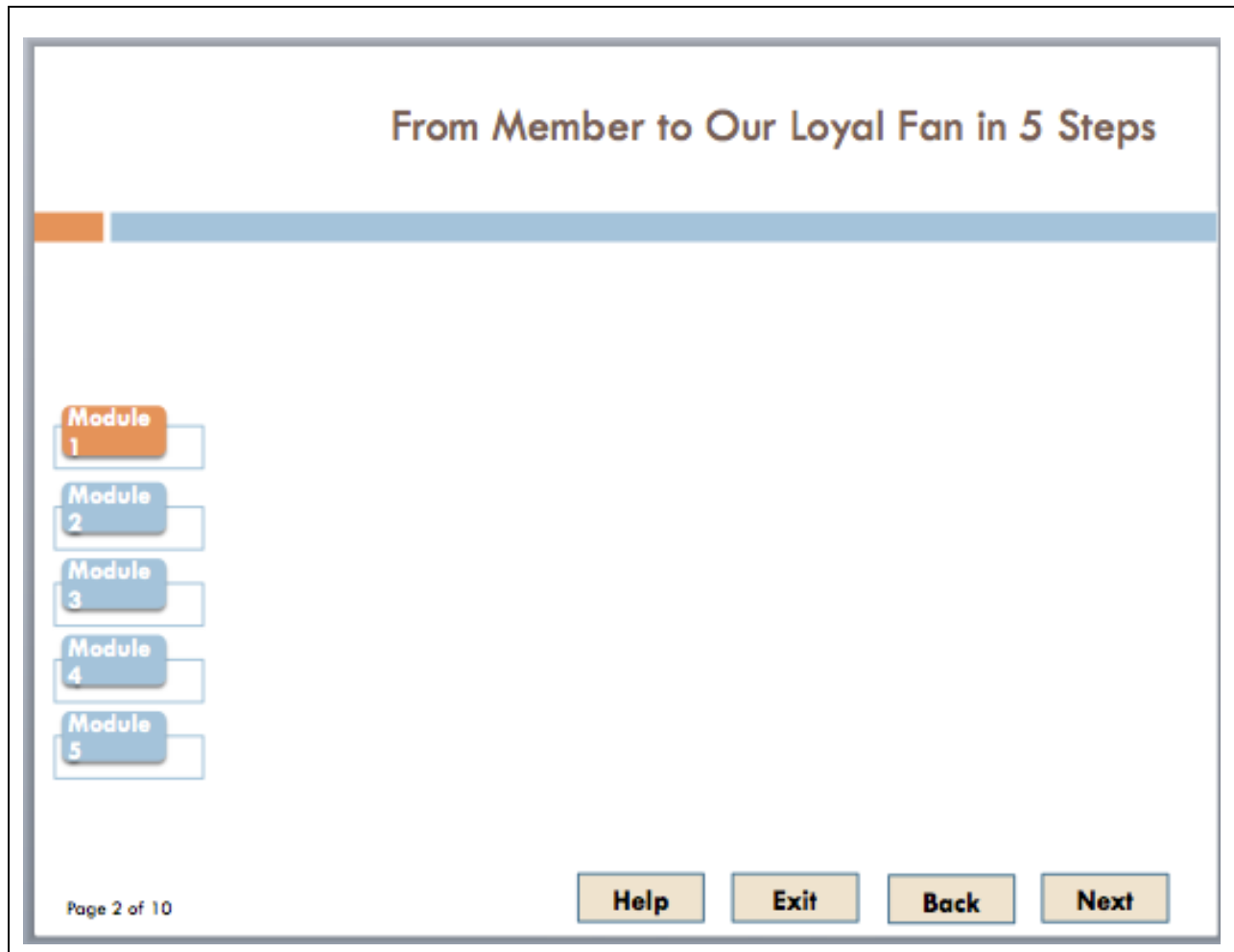
7.3 Instructional Pages

In general, instructional pages are laid out as follows:

Course title
Module title
Text and graphics. Text is placed as close to the graphics as possible.
Navigation buttons: Back, Next, Exit, Menu

Sample

7.4 Quiz Pages

In general, quiz pages are laid out as follows:

Course title Module title	
Question Type	
Question text: Question choices. Question n of n	Feedback

Navigation buttons: Next, Exit, Menu, Submit

Sample

From Member to Our Loyal Fan in 5 Steps
'Go Look It Up on the Website' is Not the Answer: Resource Knowledge Management
Knowledge Check

Question 1 of 3

Module 1
Module 2
Module 3
Module 4
Module 5

Is this statement true or false?

Documentation of member interaction is more important than actual member interaction.

O True
O False

Page 5 of 10

Help   Exit   Next   Submit

7.5 Interactional Pages

In general, interactional pages are laid out as follows:

Course title
Module title

Sample

Notes:

1. Though screen captures will be shown in the storyboards, screen content for course production will be designed using Captivate's recording functionality.

2. The floating instructional box will have a defined, visible box around it. The background color for this box will be a light blue. The text will be blue and white.