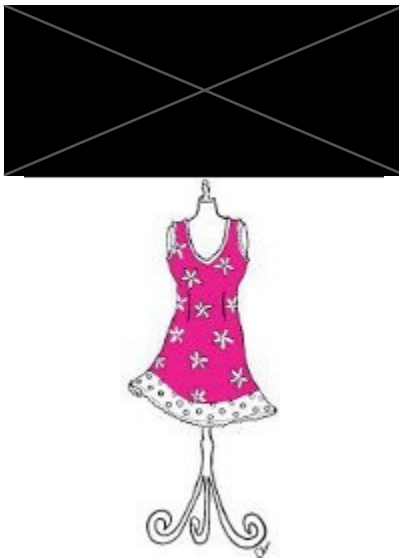


CONSULTANT LOG IN OFFICE (CLIO) IMPLEMENTATION TRAINING DESIGN DOCUMENT



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Table of Contents

Overview	5
Description.....	5
Training Goal.....	5
Target Audience	5
Training Prerequisites.....	6
Estimated Learning Time	6
Design Strategy	6
Overview.....	6
eLearning Design Strategy	7
Elearning Course Structure	7
Course Introduction and Conclusion	7
Show me	
Let Me Try It.....	8
Let me do it	8
Print-Based Materials	8
Job Aids.....	8
Scoop Exercises	8
eTour – Instructional Strategy.....	9
CAM Workshop – Instructional Strategy	10
Content Overview	10
eLearning	10
Print Based.....	11
Job Aids.....	11
Scoop Exercises for IT system Preparation Labs.....	12
eTour	12
CAM Training	12

Instructor Outline	12
Exercises.....	12
Elearning Interface Design.....	13
Approach	13
User Interface.....	13
Instructional Elements.....	14
Course Navigation	14
Course Access and Tracking	14
Training Progress.....	14
Course-Level Navigation add information about how users will track completion of topics within a course....	15
Course Look and Feel.....	16
Color	16
Fonts	16
Highlighting.....	16
Models	16
Text Callouts.....	16
Feedback.....	16
eLearning Development Assumptions.....	17
High-level Project Schedule	17
Appendix A: ELEARNING Detailed CONTENT Outline	18
1. My Home.....	18
2. My Shows.....	19
2.1. Course Introduction.....	19
3. My Orders	22
4. My Reports.....	24
5. My Connections.....	25
6. My Account	25


7. Additional Features.....	26
See cyan-colored topics within outline flow above.....	26
Michelle-Where does View Renewals belong?	26
Appendix B: Detailed Project Schedule	27

OVERVIEW

The purpose of this document is to specify the design approach that will be used to create the eLearning course, eTour, job aids, and Scoop exercises for consultants, as well as the CAM workshop training materials. These learning tools will support the implementation of the new Consultant Log In Office (CLIO) and  Central applications, respectively.

DESCRIPTION

The training curriculum consists of five components: eLearning, eTour, job aids, Scoop exercises and CAM Instructor-led training (ILT) materials.

- The eLearning course is comprised of self-paced modules that will provide Consultants the knowledge and skills needed to use CLIO.
- The eTour will provide Consultants with information on the navigation features and user interface (UI), such as menus, buttons and links, of the new system.
- The job aids and Scoop exercises are tools to provide users with additional support and reinforcement when using the system.
- CAM ILT materials will be developed to support workshops planned to train CAMS on the core functionality of the  Central application. The materials will consist of an instructor outline and scenario-based system exercises.



TRAINING GOAL

The goal of this project is to ensure that Consultants and CAMs acquire the knowledge and skills to use the new system. This will be accomplished with:

- An eLearning course to be completed by users prior to Scoop.
- Reinforcement exercises to be completed during Scoop. These will allow users to practice their skills based on their knowledge level.
- Additional eLearning modules to be completed immediately following Scoop. This training will be available for users that do not attend July Scoop 2013. It will ensure they acquire the knowledge and skills to use the system.

TARGET AUDIENCE

This training is designed for:

-  Consultants (eLearning)
-  Consultant Account Managers (CAMs) (CAM Workshop)


TRAINING PREREQUISITES

The training design assumes that all users are familiar with basic PC, Windows, Mac and iPad functionality, including using the mouse and Internet browsers.

In particular, users should have the following skills before beginning the eLearning courses:

- Basic typing skills, including familiarity with the keyboard.
- Familiarity with mouse operation, including clicking, double-clicking, dragging, and dropping as well as how to navigate without a mouse.
- Familiarity with computer graphical user interface (GUI) operations such as pull-down menus and drop-down list boxes.


ESTIMATED LEARNING TIME


Based on guidance from the  core training team, the following are estimates of the time it will take the learner to complete training. Actual time will be dependent on the amount of content and level of detailed treatment, as well as the time it takes each learner to engage with the training. For the average user, the estimate is:

- 90 minutes to complete the Pre-Scoop eLearning modules.
- 90 minutes to complete the exercises during Scoop in their appropriate lab.
- 45 minutes to complete the Post-Scoop eLearning modules.¹

DESIGN STRATEGY

OVERVIEW

We are designing training that makes the most of the capabilities inherent in web-based delivery and that will give users maximum flexibility to be trained in a manner that suits their needs. Several  specific factors drive the training design: Nature of the content, characteristics of the learners, time, and extra-curricular activities associated with the training, such as Scoop.

- Nature of the content. Software application training lends itself to eLearning. This method allows learners to see and interact with application features and functions in a way that simulates their actual working environment.
- Characteristics of learners.  Consultants are numerous (3200 or more) and geographically disperse. These factors also drive the decision to create eLearning and print materials that can easily be distributed and taken on demand by busy women with families and careers.
- Time. The target audience needs flexibility about when to take the training and needs to learn within the minimum possible time required to master the content.

¹ The run-time for the two post-Scoop courses may be less than 45 minutes. Remaining time may be applied to the pre-Scoop courses.

- Extra-curricular activities: Consultants will be attending Scoop and will engage in labs and exercises designed to enhance and extend the eLearning.

ELEARNING DESIGN STRATEGY

The eLearning curriculum (pre and post Scoop) will be self-paced and organized into approximately seven courses (five for pre-Scoop and two for post-Scoop), with each course containing one or more topics.

Each course will begin with an introduction that provides an overview of the content contained in each course and what the learner should be able to do by the end of it. In addition, each course includes topics that are related in terms of teaching CLIO features and functions. Finally, a conclusion provides the learner with a summary of what was learned in the course.

Each course will have one or more related topics. Topics are the core of the learning experience and present content and enhance the user's understanding by letting them practice working on a simulation of the application. These topics will include three types of learning methods:

- Show me (Demonstration). The learner will see a demonstration of how to complete a task along with a narrative explanation supporting the visuals.
- Let me try it (Guided Practice). The learner will try each step, with visual prompts (text bubbles) indicating what to do.
- Let me do it (Demonstrate Understanding). The learner will complete the task with minimal guidance almost as if using the actual system. These segments will be scored and will contribute to the overall course mastery.

ELEARNING COURSE STRUCTURE

The design of the course structure allows users to navigate to topics within a course, providing flexibility while taking the training as well as allowing the eLearning to be used as a reference tool after training is complete. The outline below shows the structure of a course in more detail.

COURSE INTRODUCTION AND CONCLUSION

Course introduction slides will include:

- Welcome and overview
- Learning objectives

Module summary slides will include:

- Module summary and wrap up
- Additional resources
- Congratulations

Introduction and summary slides will be supported by appropriate graphics (including photos and system screens) related to the content of the particular course.

SEE IT

As described earlier, this part of the topic provides users with a demonstration of the steps required to complete a task. Each demonstration will be accompanied by professional audio narration explaining each step.

TRY IT

This part of the topic provides learners the opportunity to practice the task just demonstrated. The design objective is to determine the critical skill(s) to be practiced and then to develop a simulation that allows the user to practice the skill(s) without risk of getting lost or confused. Our philosophy is to guide the user only when needed. If the user is performing correctly, the simulation functions as closely to the real application as possible. The Let Me Try It activity will include prompts and feedback as text only.

DO IT

Do It segments allow the learner to engage with the application in an unguided environment, demonstrating an understanding of the topic. Learners must complete the Let Me Do It activity with 80% accuracy in order to earn credit for the course. Let Me Do It activities will include minimal prompts and feedback in a text format only.

For more information on each lesson's content, please refer to the detailed content outline in *Appendix A*.

PRINT-BASED MATERIALS

JOB AIDS

Two job aids have been identified to be included in the training curriculum:

- Browser Check/Update – will instruct users on how to check the browser they are using and to update the browser if necessary.
- CLOI Quick Reference – Cheryl F. and Lisa will discuss. Michelle will provide a list of the most common functions to be covered. Add Quick Reference info here once that is done.

Both job aids will be available for users before and after Scoop.

SCOOP EXERCISES

There will be multiple practice exercises that correspond with the module topics for both the Pink and Blue Scoop labs that support the core eLearning modules.

Each exercise assumes that users have mastered all core eLearning modules. The exercises will present various scenarios to allow users additional chances to practice core CLIO functionality.

During Scoop, CAMs will facilitate the lab sessions, provide assistance, and be available to answer questions. GLS personnel will be available to assist.