End-to-End Instructional Design Project Example

Customer Service Agent Onboarding Restructure

Setting

Government Healthcare Compliance Environment:
- 2,500+ Customer Service Agents
- 300+ Support Staff

Existing onboarding training:
- Knowledge level/foundations only
- Missing software training and application opportunities

Task

My role:

- Lead improvement initiative for an existing customer service agent onboarding curriculum

Action: Identify Performance Gap

Business concerns:

- High call escalation rates
- Low learner satisfaction with training (Main complaint: need software practice)
- Supervisors overwhelmed with coaching demand

Core issues identified:

- Software application/practice failure, not knowledge deficiency

Action: Key Instructional Design Decisions

Expand systems exposure and use by:

1. **Revise instructional sequence**
   - Reorder existing VILTS
   - New categories
   - "Tell, show, do, evaluate"
2. **Add scenario-based activities ("labs")**
   - Systems application
   - Call simulations
   - Gradual increase in complexity:

Action: Restructure

- New categories, sequencing
- New scenario-based activities and simulations to practice systems and calls ("Labs")

1. Core Skills
*Labs = systems

- Introduction to CSR Training VILT
- Introduction to Salesforce and AWS VILT
- CSR TRAIN Systems Practice Lab
- Salesforce Knowledge Base VILT
- Salesforce Navigation & KB Lab
- Core Skills Review
- Core Skills Final Assessment

2. Call Management
*Labs = call structure

- Soft Skills VILT
- Call Foundations VILT
- Evaluating Calls VILT
- Evaluating Calls Lab
- Call Documentation VILT
- Call Documentation Lab
- Health Crisis VILT
- Probing Questions VILT
- Probing Questions Lab
- Call Management Review
- Call Management Final Assessment

3. Caller Support
*Labs = systems

- Beneficiary Information VILT
- Beneficiary Information Lab
- Special Circumstance Beneficiary VILT
- Special Circumstance Beneficiary Lab
- Plans and Eligibility VILT
- Plans and Eligibility Lab
- Providers VILT
- Providers Lab
- Caller Support Review
- Caller Support Final Assessment

4. Support Topics
*Labs = call simulations w/ systems

- Explanation of Benefits (EOB) VILT
- EOB Call Simulation Lab
- Claims Overview VILT
- Taking Claims Calls VILT
- Claims Call Simulation Lab
- Referrals and Authorizations VILT
- Referrals and Auths Call Simulation Lab
- Primary Care Manager VILT
- Primary Care Manager Call Simulation Lab
- Enrollments Part One VILT
- Enrollments Part Two VILT
- Enrollments Call Simulation Lab
- All Call Types Simulation Lab
- Support Topics Review
- Support Topics Final Assessment

5. Nesting
*On the Job Training w/ Peer and Coach

- Introduction to Nesting VILT
- Nesting (separate schedule)

Action: Scenario-Based Learning/Simulations

1. **Scenarios and simulations** ("Labs")
   - Gradually increase in complexity
   - Scenario development template for collaboration with trainers/coaches

2. **Software navigation practice**
   - Authentic simulations
   - Immediate feedback

3. **Customer service call simulations**
   - Real-world scenarios
   - Immediate feedback

Section 2: Complete Scenario Development

Full Scenario Narrative (include customer background, issue, emotion, context, and constraints):

Step-by-Step Call Flow (opening, discovery, resolution, closing):

Decision Points & Branching Options:

Correct Response Path (model answer):

Common Error Path & Coaching Feedback:

Results: Impacts

Reaction: Increased learner survey net promoter score (NPS)

Learning: Increased training assessment scores

Behavior: Decreased coaching interventions

Behavior: Decreased call escalations

Results (Expected ROI)**:**

- Higher customer satisfaction
- Less remediation at the customer service agent level
- Higher caller support rates/speeds