THE ELEARNING
DESIGNER'S ACADEMY

Customer Service at Webistia

Instructional Design Case Study

Welcome

This document is your working case study for the Instructional Design Certificate Program. It has two parts.

The first part is the Webistia story. It introduces a fictional company, a cast of characters, and a set of performance problems that unfold over two weeks of analysis. Read it carefully and engage with every prompt along the way. The decisions you make as a designer depend entirely on what you find in the analysis, so the quality of your thinking here shapes everything that follows.

The second part is yours. Once the story ends, the document becomes a record of your design process: the solution you proposed, the decisions you made, and the rationale behind each one. You will fill it out week by week as the program progresses.

There are no predetermined right answers in this case study. Two students in this program can analyze the same data, identify the same problems, and arrive at genuinely different solutions. Both can be excellent. What makes a solution strong is not which components you chose or which modalities you selected. What makes it strong is whether you can explain why, and whether that explanation connects back to something you actually found in the analysis.

Every prompt in this document is asking some version of the same question: Why? Why this solution? Why this audience? Why this modality? Why this approach? The more specific you can be in your answer to that question, the more this document becomes something worth presenting to a future employer or client. Work through it honestly. Your thinking is the artifact.

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The Company

You work as an instructional designer on the Learning and Development team at Webistia, a technology company that helps small businesses establish and grow their online presence. Webistia serves more than 400,000 small business customers across North America and has been growing rapidly over the past two years.

Webistia offers three core products:

- **Webistia Website Builder:** the company's flagship drag-and-drop tool that lets small business owners build their own website without any technical experience. This is what most customers come to Webistia for first.
- **Webistia Marketing Suite:** a set of tools for email marketing, search engine optimization, and social media scheduling, designed specifically for small business owners who are not technical.
- **Webistia Pro:** a premium, done-for-you service where Webistia's team builds and manages the customer's website on their behalf. It is the highest-priced product Webistia offers and requires more conversation to explain and sell than the other two products.

How Webistia's Customer Support Team Works

When customers have questions, run into problems, or want to learn more about upgrading their service, they contact Webistia's customer support team by phone. Support agents at Webistia do two things on every call: they help customers solve problems, and they look for opportunities to recommend products or upgrades that might benefit the customer. This means support agents are not just solving technical issues; they are also expected to have conversations about Webistia's products and, when appropriate, help customers move to a higher tier of service. This dual role is an important context for understanding the performance challenges in this case study.

Webistia's customer support team operates across two call centers, one in **Phoenix, AZ,** and one in **Austin, TX**, plus a **remote team** that was built out during a rapid hiring push over the past 18 months. There are currently **340 customer support specialists** and **18 team managers** across all three locations.

Over the past 18 months, Webistia has added approximately 140 new specialists to keep pace with customer growth. That means roughly **41% of the current team has been with the**

company for less than 12 months. As you will see, this matters significantly when you start analyzing the performance data.

You and your direct manager make up Webistia's entire Learning and Development function. There are no other instructional designers, no project coordinators, and no dedicated media or development resources. Everything that gets built gets built by the two of you.

The Cast of Characters

Rachel Kim, VP of Customer Experience. Rachel joined Webistia eight months ago from a larger technology company. She was brought in specifically to improve customer satisfaction scores and grow revenue from the support function. She is data-aware, moves quickly, and has already made commitments to the CEO. She tends to arrive at conversations with a solution already in mind.

David Chen, Director of Customer Support Operations. David has been with Webistia for six years and built the customer support function nearly from scratch. He knows every process and most agents by name. He is measured in how he shares information; he will give you observations and point you toward where to look, but he will not hand you conclusions. That is your job.

Derek Walsh, Customer Support Manager, Austin. Derek was promoted into a management role ten months ago after being one of the top-performing agents on his team. He is motivated and genuinely wants to do well. But he is managing his team the way he was managed as an agent, and he is starting to realize that may be contributing to his team's low scores.

Part 1: The Request

It is a Monday morning when you get a meeting invite from Rachel Kim. The subject line reads: *"Customer Support Training Initiative, L&D Kickoff."* The meeting is Wednesday. Attached is a short message:

> **From:** Rachel Kim, VP of Customer Experience
>
> **To:** L&D Team
>
> Team, we are dealing with two problems, and I need your help building training to address both of them.
>
> First, our customer satisfaction scores have been sliding for three straight quarters. Our agents need a refresher on our service standards. We need everyone following the same approach on every call.
>
> Second, sales of Webistia Pro through our customer support team are significantly down compared to last year. To be clear, I am talking specifically about sales that happen through our agents on calls, not purchases customers make directly through our website. Agents need product knowledge training so they can speak to Pro more confidently and recommend it more often.
>
> I want to move quickly on this. Can we get aligned on scope and timeline this week? I have already flagged this to David (CEO) and he is supportive.
>
> — Rachel

Before Wednesday's meeting, you pull a few high-level numbers from the company dashboard:

- Overall customer satisfaction scores have dropped from **84% to 74%** over the last three quarters
- Webistia Pro sales through the support team have dropped from **$1.4 million last year to $970,000** this year, a decline of **31%**

Leadership has set goals for the fiscal year to address both of these declines. That is all you have going into Wednesday.

Your Turn

Rachel has decided she wants two things: a customer service refresher for all 340 agents and a product knowledge course on Webistia Pro. Before you agree to build either of those, what concerns do you have about committing to those solutions based on what you know right now?

1) As noted, 41% of the support team consists of people who joined within the last 12 months – but that also means 59% have been around longer. The needs of people who are new to the company are not necessarily the same as those of veteran employees.
2) Is product knowledge really the determining factor as to why Webistia Pro sales are down? It could be other factors - maybe the product's not that good, maybe support calls are not the right time to upsell, maybe outside forces (like call metrics) are preventing people from putting in the effort to sell it.
3) Does it make sense to keep the product knowledge course separate from the customer service one? Or should they be combined?

For each problem Rachel described, what are two or three possible root causes you would want to investigate? Keep in mind that the surface-level symptom, scores are down and sales are down, may not tell you what is actually causing the problem.

- What has existing training been like? Any differences between onboarding of new employees vs. those that have been in the company longer?
- How are the teams structured, ex: are certain types of calls routed to particular job titles? Do newbies get stuck with the tougher calls?
- What are the typical support issues that customers call with? Errors/problems, "how do I…?" etc.
- Do customer satisfaction scores vary noticeably between the Phoenix, Austin, and remote teams?
- Are team managers generally promoted from within or recruited from outside? Are satisfaction scores generally consistent between different teams in one location?
- Do certain customer segments (company size etc.) call support more than others?
- What other channels is Webistia Pro sold through? How are they doing YOY?

You are walking into Wednesday's meeting with Rachel. Write out at least five specific questions you would want to ask her before agreeing to scope a solution.

1) Besides customer satisfaction, how are reps evaluated?
2) How are Webistia Pro sales doing in other channels?
3) What training and onboarding do agents currently receive?
4) What else has changed in the last year besides new support staff?
5) What do the agents say about these issues?

On Wednesday, Rachel walks through her thinking in more detail. She wants a company-wide customer service refresher for all 340 agents, plus a product knowledge course on Webistia Pro. She has already told David (CEO) to expect measurable progress on customer satisfaction scores within the current quarter, and she is counting on training to be part of what moves that number. She would like both courses launched within 60 days.

You ask whether the data shows the same problem across all agents and all teams. She does not have a clear answer. You make the case for taking two weeks to do a proper analysis before committing to a solution, and she agrees.

Your Turn

You have two weeks to investigate what is actually going on before recommending anything. You need a plan for how you will find out.

There are many ways to gather information when analyzing a performance problem. You might talk directly to people involved, such as managers, employees, or stakeholders. You might review existing data like performance numbers, survey results, or reports. You might look at existing training or documentation to understand what people have already been taught. Or you might observe the work happening directly to see what is actually going on.

What would you want to find out, and how would you go about finding it?

What do you want to find out?	How would you go about finding it?
What are customers calling support about? Is the mood curious or frustrated?	Call records, metrics
How does customer satisfaction vary between and within teams? What issues are we hearing about?	Customer satisfaction metrics
What is the current onboarding process like?	Review existing training
What do the agents think about decline in CSAT scores and Pro sales?	Talk to or survey agents about their experience
What other metrics, if any, are agents evaluated on?	Talk to David (Dir CSO) and Derek and obtain any available data

You know you will want to talk to people inside the organization. Who would you want to speak with, and before you read any of those conversations, write down one or two things you are specifically hoping to learn from each person?

Person or group	What are you hoping to learn before you talk to them?
David	What does he feel is the issue? What metrics can he provide?
Derek	What is he noticing in his transition from agent to manager? Why does he feel like he may be part of the problem?
Agents (in general)	Are you aware of the decline in customer service scores? What do you think about it? What complaints or comments do you hear a lot? How do you go about selling Webistia Pro? Are customers receptive to it?
Agents (newer)	What kind of onboarding did you go through? What kind of problems have you encountered specifically as a new agent?

What are the key questions your analysis needs to answer before you can responsibly recommend a solution?

- What is the problem to solve? What is causing the issue(s)?
- Are there gaps that existing training does not cover?
- Why are Pro sales down? Are agents bringing it up less, or are customers more resistant to it?
- How are managers coaching their agents in high- vs. lower-performing teams?

Part 2: The Analysis

You spend two weeks conducting your needs analysis. Here is what you set out to do, and what you find.

Step 1:	Define the Business Goal

Before collecting data, you follow up with Rachel Kim to pin down what the organization is actually trying to achieve. The dashboard showed declining scores and falling sales, but those are symptoms. You need to understand the goal before you start investigating the cause.

Rachel reaffirms the goals she described in her original message:

- Return overall customer satisfaction scores from **74% to 82%** by end of fiscal year
- Recover Webistia Pro sales through the support team from **$970,000 back to $1.2 million** by end of fiscal year

Your Turn

In one sentence, describe what Webistia is ultimately trying to achieve, not the specific numbers, but the underlying outcome. Why does getting this right matter before you start collecting data or designing anything?

Webistia wants its support team to better serve and satisfy customers while also achieving the business goal of upselling them on Webistia Pro.

It's important to get this right because otherwise we waste time trying to solve the wrong problem (or no problem at all). Training isn't necessarily the solution to every problem, and if we don't address the real causes then it's just a waste of time and effort.

Step 2:	Collect the Data

To get a complete picture of what is actually driving these problems, you take the following steps:

- Meet with **David Chen**, Director of Customer Support Operations, for his operational perspective
- Meet with **Derek Walsh**, Customer Support Manager in Austin, to understand the management layer
- Pull and review **performance data,** including customer satisfaction scores broken down by agent tenure and by team
- Send and review a **pulse survey,** a short, anonymous survey sent to all 340 agents to capture their perspective directly.
- Review the **existing new hire training** to understand what agents have and have not been taught
- Spend time **observing calls** and talking informally with agents across Phoenix, Austin, and the remote team

Conversation with David Chen, Director of Customer Support Operations

Before you read this conversation, you are about to hear from the person who has the most operational knowledge of how the support team actually runs. Write down one or two things you are specifically hoping to learn from him, before the conversation tells you anything.

1) What insights does he have on the CSAT decline and the performance differences between agents?
2) What does he think is driving the decline in Pro sales through this channel?

💬 **David meets with you for an hour. He is deliberate and measured; he gives you observations, but he stops short of drawing conclusions for you.**

He starts with the customer satisfaction picture. *"When I look at the scores broken down by how long agents have been with us, the story gets more interesting than the overall number suggests. I would spend some time with that data before you go much further."*

You ask whether he has a theory about what is driving the decline. *"I have some observations. We hired fast over the past 18 months and our onboarding has not kept pace. We have a customer service framework, we call it the Webistia Service Standard, that we expect every agent to follow on every call. It is documented, but I am not sure it has ever been properly taught. New agents in particular have had to figure it out on their own."*

He pauses. "*But I want to be careful not to make this only a new hire story. When I look at some of the team-level data, the tenure explanation does not fully hold up everywhere. There are teams with experienced agents who are also underperforming. I would look at the Austin numbers specifically and ask yourself whether the problem there is really about knowledge."*

You ask about Pro sales. David leans back. *"I genuinely am not sure what is driving that. I would talk directly to agents. Ask them specifically about Pro, why they do or do not bring it up on calls. You might be surprised by what you hear."*

Before the conversation ends, he mentions one more thing. *"One thing that does not get talked about enough is that agents have no good reference for product information. They get an overview in onboarding and then they are on their own. Products change, pricing changes, and there is nothing easy to pull up quickly. I am curious what you find when you ask agents how they actually handle that on a call."*

He adds one final note as you wrap up. *"I am happy to be a resource for you on this, but I want to be upfront: my schedule is tight and I am hard to pin down. If you need my input at specific points in the project, you will need to plan for that in advance and tell me exactly what you need from me. I cannot be available on short notice, and neither can Derek."*

Your Turn

David pointed you toward several areas to investigate without naming the problems directly. What are the distinct threads you are now tracking, and what specific data or conversations would help you follow up on each one?

1) Tenure: newer employees not getting the training or support they need
2) Resources: what do agents reference for product questions/knowledge?
3) The Customer Service Standard: what is it, does it make sense, how is it being taught and reinforced (or not?)
4) Location: Austin is particularly underperforming in ways not explained by tenure, is that related to new management there? What has changed?
5) Pro: how do agents try to sell it? How knowledgeable are they? Are customers receptive?

David said the Austin team data raises a question that the tenure explanation does not answer. What do you think he means, and what would you look for in the data to understand it better?

We know Derek was recently promoted to the manager of the Austin support team. In the intro it says he acknowledges the slipping scores and worries he may be contributing to it by managing people the way he was managed. I'd look to see whether Austin's lower scores are independent of tenure or if there are any other patterns explaining them.

Conversation with Derek Walsh, Customer Support Manager, Austin

Before you read this conversation, you are about to hear from a recently promoted manager whose team has some of the lowest scores in the company. Write down one or two things you are specifically hoping to learn from him, before the conversation tells you anything.

1) What challenges have you faced as you adjust to management?
2) How do you coach the agents on their team? What metrics have you focused on?

💬 **Derek is candid in a way that is clearly costing him something to admit.**

"My team's numbers are not where they should be and I know it. I have been trying to figure out what is going on."

You ask what he thinks is happening. *"I think part of it is how I manage. When I was an agent, the things that got you noticed were handle time and call volume."*

It is worth pausing here to explain what those terms mean, because they are central to understanding Derek's situation:

- **Handle time:** how long each individual call takes from start to finish. A shorter handle time means an agent is completing calls faster.
- **Call volume:** how many calls an agent completes in a shift. Higher volume means more calls handled per day.

Derek continues: *"Those are the metrics I grew up on, so those are the ones I coach for. I push my team to get through calls efficiently; solve the problem, keep the call moving, get to the next one."*

You ask whether his team knows the Webistia Service Standard. *"They know it exists. But honestly, I have never really coached them on it. I am not sure I know how to coach someone on a call. I can listen to a recording and know if it was good or bad, but I do not have a framework for turning that observation into a useful conversation with an agent. Nobody ever showed me how to do that."*

He adds: *"I do not think I am the only manager in this situation. A lot of us who got promoted in the last couple of years came up as agents. Being a great agent does not automatically mean you know how to develop one."*

Your Turn

Derek described how he measures and coaches his team. Looking ahead at the data you are about to review, why might focusing on handle time and call volume produce low customer satisfaction scores, even with experienced, technically capable agents?

Customers want to feel they're being listened to and want their problem addressed. Incentivizing agents to get through more calls in less time means they're trying to get through the call as fast as they can, which isn't necessarily conducive to addressing the issue in a satisfactory way.

Derek said he does not know how to coach someone on a call. What kind of performance problem does that represent, and what type of solution does it suggest?

It sounds like Derek was promoted into management without being trained on how to manage people. Managing people who do a particular job requires different skills than doing the job. He seems motivated and knowledgeable but the company doesn't seem to be giving the support he needs.

Ideally there'd be training for Derek and his peers on how to manage agents, in addition to any training for the agents. There's also potentially clashing expectations in terms of metrics/incentives, which is likely not a training issue.

The Data

You pull several data sets from the operations system.

Customer satisfaction scores by agent tenure: Tenure refers to how long an agent has been working at Webistia. Customer satisfaction scores come from short surveys sent to customers after a support call; customers rate their experience and those ratings roll up to a percentage.

Agent group	Avg. customer satisfaction	Share of total team
Under 12 months with Webistia	66%	41%
1 to 2 years with Webistia	75%	24%
More than 2 years with Webistia	83%	35%
All agents combined	74%	100%

Customer satisfaction scores and handle time by team: Handle time is shown in minutes. A lower number means calls are shorter on average. Note that shorter is not always better; it depends on whether the customer's issue was fully resolved and whether they felt well served.

Location	Manager	Avg. satisfaction score	Avg. handle time per call
Phoenix, Team A	Carmen Reyes	84%	7.8 min
Phoenix, Team B	Andre Santos	81%	8.1 min
Austin, Team A	Derek Walsh	63%	6.9 min
Austin, Team B	Keisha Brown	72%	8.4 min
Remote, Team A	James Okafor	76%	8.2 min
Remote, Team B	Wendy Park	73%	8.0 min

Webistia Pro sales through the support team: These figures represent only sales closed by agents during support calls, not purchases made directly through the Webistia website.

Time Period	Pro Sales	Website Builder sales	Marketing Suite sales
Prior year	$1.4M	$3.1M	$1.8M
Current year	$970K	$3.4M	$2.1M
Change	-31%	+10%	+17%

Your Turn

What patterns stand out in the customer satisfaction data? What does the tenure breakdown suggest, and what does Derek's team's data tell you that the tenure breakdown alone does not explain?

Tenure breakdown suggests that customers are more satisfied when dealing with agents that are more experienced, whereas newer agents can struggle to measure up.

Derek's team's data suggests that the shorter call times are detrimental to satisfaction rates. This isn't an absolute rule, though – in Phoenix the team with shorter calls has higher scores but it's by a smaller margin.

Look at Derek's team specifically. Their average handle time is the lowest of any team shown, meaning their calls are the shortest. But their satisfaction score is also the lowest. What does that combination suggest?

In trying to get the customer off the phone quickly, they're shortchanging them in service. Derek either came up in an environment where satisfaction scores were less emphasized, or else it comes naturally to him so he was coached to emphasize call time, and by imitating that management style he is likely inadvertently not striking the right balance with his own team.

The Pro sales data shows a significant drop, but Website Builder and Marketing Suite sales through the same support team are both up. What does that pattern suggest about the cause of the Pro decline

It suggests it's something specific to Pro and not a general issue with selling through the support team.

To get the full picture we'd want to see what's going on with Pro sales overall – is it also declining through the website or other channels? If not, what is the root of the problem with selling it via the service team?

AI Assist

Copy the three data tables above and paste them into an AI tool of your choice.

🤖 **Ask it:** *"Based on this data from a customer support organization with 340 agents, what conclusions can you draw about why customer satisfaction scores are declining and why sales of one product are down, and what would you recommend?"*

Once you have the response, answer the following: What did the AI get right? What did it miss or jump to too quickly? What did you know from your conversations with David and Derek that the AI had no access to? If someone had acted on the AI's recommendation without doing any further analysis, what might have gone wrong?

It notices Derek's team's low average and comes to the same conclusion regarding call time. It also notes that Austin Team B is slightly below average, suggesting Austin overall may be an outlier in ways not solely related to Derek's management. It also suggests seeing what Phoenix is doing right.

It correctly notices the Pro issue is specific to that product, but seems to think that means the problem is the product and not support, not considering that product knowledge could be an issue.

It also might be overemphasizing tenure which, as David noted, is not everything.

It doesn't have the context that Derek and some other managers are new to managing, so using Claude's recommendations would miss that important piece of the puzzle. It also didn't quite seem to grasp that Webistia Pro is not only sold through the support channel so this may not be a sign of overall decline in the whole product.

Agent Pulse Survey

A pulse survey is a short, anonymous survey sent to employees to quickly capture their perspective on a specific topic. Because it is anonymous, employees are more likely to share honest opinions than they might in a direct conversation with a manager.

You send a short survey to all 340 specialists. Here are the findings that stand out:

- **58%** of agents who have been with Webistia less than 12 months said they were "not familiar" or "only somewhat familiar" with the Webistia Service Standard
- **64%** of agents on below-average scoring teams said their manager's primary coaching focus was call speed and volume, not service quality
- When asked how they find product information during a call when they are unsure of something, **73%** of agents said they search for it on their personal phone while the customer is waiting; there are no official reference materials available to agents during calls
- When asked directly about Webistia Pro, **43%** of agents said they "rarely or never" bring it up on calls; of those agents, **61%** gave the same reason: "The commission on Pro is not worth the extra time and effort it takes to explain."

Note: Commission refers to a small bonus agents earn when they successfully sell a product upgrade or add-on during a call. Different products pay different commission amounts.

Your Turn

The survey gives you something the interviews and operational data could not: the agents' own perspective. What does it add to or change about the picture you were forming?

1) Supported that the Webistia Service Standard is not being trained/coached as per Derek.
2) Supported that emphasizing call speed/volume is detrimental to customer satisfaction.
3) Called out a need for product information – not necessarily training, but reference materials, job aids. Something accessible on their desktop and not their personal phone.
4) Revealed a problem with the incentive structure for Pro, perhaps especially when coupled with the call time metrics.

The Pro finding is significant. What does it tell you about the root cause of the Pro sales decline, and why does it change the recommendation you would make to Rachel?

It suggests that the sales incentives are not aligned with the product's complexity or utility. I would recommend re-evaluating bonuses and increasing the incentive to sell Pro – this doesn't seem like an issue for training to solve.

Agents are searching for product information on their personal phones while customers wait on the line. What type of problem is this, and what type of solution does it point toward? Why might a training course be the wrong answer here?

This is a resources/environment issue. Agents don't have a good source of product information available on their desktops.

A one-time training course could help a little in the short term but in the long term people can't be expected to remember it all – they need something like a knowledge base that helps them find the answers easily while on a call.

Existing Training Review

You pull and review the current new hire onboarding program. It runs approximately three weeks and is mostly self-paced. Here is what you find:

You send a short survey to all 340 specialists. Here are the findings that stand out:

- The Webistia Service Standard is referenced once in a policy overview module but is never taught, practiced, or assessed; new agents read about it but are never asked to demonstrate it
- All three products are covered in a single two-hour overview module; agents are introduced to features and pricing but there is no practice, no scenarios, and no opportunity to try explaining the products to a customer
- There are no manager touchpoints built into the onboarding period; new agents complete the program largely on their own with no structured check-ins in their first 90 days
- The product overview content was last updated 14 months ago; pricing and features for all three products have changed since then
- There is no training of any kind on how to have a product recommendation conversation with a customer

You go looking for the source material you would need to build training around the Webistia Service Standard. What you find is a single two-page policy document. There are no examples, no scripts, no call recordings, and no additional guidance. If training is going to be built around the Service Standard, the content will need to be developed largely from scratch, in close collaboration with whoever owns the standard.

Field Observations

You spend a day and a half listening to calls and talking briefly with agents across Phoenix, Austin, and the remote team.

On calls where a natural opportunity to recommend a product upgrade comes up, most agents do not pursue it. Afterward, agents tell you two things: *"I do not know enough about Pro to feel confident explaining it"* and *"it is just not worth the commission for how much extra work it is."*

When you observe Derek's Austin team, agents are technically competent; they resolve customer issues quickly and accurately. But calls end abruptly. There is no warmth in the close, no check to see whether the customer has other needs, and no mention of other products or services. One agent, after a call, says: *"Derek pulls our recordings every week. The feedback is always about time. Get in, solve it, wrap it up."*

On the Phoenix teams with stronger scores, calls run slightly longer but follow a consistent rhythm. You notice agents asking a follow-up question before ending almost every call, something like *"Is there anything else I can help you with today?"* or *"Have you had a chance to look at any of our other options?"* When you ask one of those agents what guides her approach, she pulls out a handwritten card from her desk. It is a personal reference she made for herself, a simplified version of the Webistia Service Standard with her own notes added. *"Nobody gave me this. I made it after a coaching session with Carmen."* Carmen is her manager, one of the Phoenix managers with strong team scores.

Step 3:	Analyze the Data

Your Turn

You have now gathered information from multiple sources. What story does all of it tell when you look at it together?

Webistia's agents are knowledgeable and capable about addressing customers' issues, but get conflicting signals when it comes to call volume vs. quality. The Service Standard is supposed to guide agents, but it's not taught, coached, or even easy to find.

Managers can have a big impact on their teams' scores but can also steer them wrong, and not all managers have been trained specifically for their role.

Product documentation is lacking or unusable.

Use the table below to map out the distinct performance problems you have identified. Be precise about the audience for each problem; "all agents" may be too broad, and the data may point to a more specific group for some of the problems you identify.

There are four root cause categories to consider when analyzing a performance problem:

- **Knowledge gap:** people do not know what to do or how to do it
- **Skill gap:** people know what to do but cannot consistently do it well in real conditions
- **Motivation gap:** people could do it but choose not to, often because of incentives, consequences, or culture
- **Resource gap:** something outside the person makes it difficult or impossible to perform, regardless of knowledge, skill, or motivation

Audience	Specific performance issue	What is causing it	Root cause category
Agents in Austin	Declining customer satisfaction scores	Clashing incentives, management emphasis on call speed	Skill
New Agents	Lower customer satisfaction scores	Lack of familiarity with Service Standard	Knowledge
All Agents	Call delays when searching for product information on cell phones	Lack of product documentation/resources	Resource
All Agents	Lower sales of Webistia Pro	Lack of incentive to sell it	Motivation
Managers	Giving teams insufficient or inapplicable coaching	Agents promoted to management without onboarding as managers?	Skill

Look at Derek's team again. Their scores are the lowest in the company, but their agents are experienced and technically capable. Who actually needs to change their behavior for this team's scores to improve, the agents or Derek? Explain your reasoning using the data.

Derek, because he's telling them to do more calls quickly rather than going the extra mile for customers. He mentioned in the intro that he manages people the way he was managed – maybe customer satisfaction comes naturally to him but he needed the reminder to wrap it up in a timely way, whereas members of his team may have the opposite issue.

There are two separate problems that both show up as "agents not selling Pro." What are those two problems, and why do they require two completely different solutions?

One is the incentive structure – the commissions just don't incentivize agents to sell Pro and they feel it's not worth their time.

The other is product knowledge, where people don't know enough about the product to sell it. A basic overview is part of existing onboarding but features change – this should be addressed with resources.

Step 4: **Present the Results**

Your Turn

For each problem you identified, summarize your findings and your recommendation.

Training or non-training?	Root cause	Your Recommendation
Training	Skill	Managers should coach agents in the balance between call speed and quality
Training	Knowledge	Agents need training and reinforcement in the Webistia Service Standard.
Non-Training	Resource	Agents need access to product information/docs on their desktop machines, accessible while on the phone with customers
Non-Training	Motivation	Re-evaluate sales commissions for Webistia Pro.

Rachel asked for two things: a company-wide customer service refresher for all 340 agents, and a Webistia Pro product knowledge course. Based on your analysis, are either of those the right solution? For each one, explain what you would say to Rachel and why.

A customer service refresher for all 340 agents is not what's needed. There are specific issues to target, but people seem to have a good understanding of how customer service works. They just need coaching on certain issues and the specifics of the Webistia Service Standard.

Product knowledge is indeed an issue, but a one-time course is just throwing information at them that will change as new features are launched, and it's information they're not going to retain. We should instead focus on giving agents an up-to-date information resource that they can refer to on the job.

Write two or three sentences summarizing your overall findings, the kind of thing you would say at the start of your meeting with Rachel to set up everything that follows.

Webistia's service teams are smart and capable, and they want to do a good job. Instead of trying to make a one-size-fits all training solution, we should take a look at a few specific issues and come up with solutions to make sure we're addressing the problems where they are: education about the Service Standard, training for newer managers, and product info resources for agents.

The Webistia story ends here. From this point forward, there are no predetermined right answers. Two students in this program could analyze the same data, identify the same problems, and still arrive at genuinely different solutions, each one defensible if the decisions are grounded in what the evidence showed. What matters is not which solution you chose but whether you can explain why you chose it.

Every decision you make from here should connect back to something you found in the analysis. That is what makes a design intentional rather than arbitrary.

Part 3: Your Design

Your Overall Solution: Based on everything you found in the analysis, what is your initial thinking for how to approach this? You do not need a fully formed answer yet. What shape does a solution start to take in your mind, and why? Which audiences are you designing for, and what type of solution does each one seem to call for?

Aside from the incentive issue, there are three main themes:

- Teaching and reinforcing the Webistia service standard
- Helping new managers learn to manage
- Making up-to-date product knowledge accessible

Service standard training is appropriate for new hires as well as underperformers. There could be an eLearning component, especially since it may be difficult getting this audience away from the phones for ILT or workshops.

Manager training could be more ILT and in (remote) groups. eLearning might be able to reinforce or support it but I'd like to see some peer-to-peer mentorship, I think this is the kind of people skills stuff that doesn't necessarily lend itself to eLearning.

Product info – there should likely be updates to the initial onboarding but overall the main thing is making resources available and accessible.

Your Action Map

An action map connects each business goal to the specific behaviors that need to change on the job, and to the practice and content that would support that change. It is a planning tool, not a final design decision.

Think of it as mapping the territory before you start building.

A few things to keep in mind as you complete this:

- Only audiences with a training or performance support solution need to appear in the action map. If your analysis determined that a problem is not a training problem, there is no action map row for that audience.
- Specify the audience in each row, because different audiences may need to do different things to achieve the same business goal.
- The same business goal may have multiple rows if multiple audiences need to behave differently to achieve it.

Business goal	Audience	What they need to do differently on the job	Potential practice activities you might design	Information or knowledge they would need to complete that practice
Increase customer satisfaction scores from 74% to 82%	New/recent hires; underperforming agents	Apply the guidelines of the Service Standard	Practice realistic call scenarios, either with another person or maybe simulation/quiz	Webistia Service Standard information and any info on expectations not included in it (ex: selling product in a service call, if that's not covered)
Increase customer satisfaction scores from 74% to 82%	New/ underperforming managers	Coach agents to follow service standards (while also keeping call times/volume reasonable)	Roleplays, videos, recorded calls to evaluate	Understanding metrics and what targets to hit, how to coach their agents
Agents should use up-to-date product information in calls	All agents	Get current product information without using personal phones	Quizzes? Practice using a knowledge base? Not sure if we need practice here though.	Info resources - knowledge base, FAQs etc.

Your Learning Objectives

For each audience receiving a training solution, write one terminal objective and at least two enabling objectives. The terminal objective is the overarching performance outcome for that audience. The enabling objectives are the specific, observable things learners need to be able to do to achieve it.

Only write objectives for audiences receiving a training solution. If your analysis determined that an audience's problem is not a training problem, note that here and briefly explain why you are not writing objectives for them.

Audience	Terminal objective	Enabling objectives
New or underperforming agents	Apply the Webistia Service Standard on a real or simulated call to give customers a pleasant and satisfactory support experience.	1. Learn the guidelines of the WSS and how to apply them 2. Complete calls within average xx minutes 3. Achieve improved score in customer service surveys
New or underperforming managers	Have coaching conversations with agents that result in improved CSAT scores by giving actionable steps that agents follow	1. Give feedback that improves customer satisfaction 2. Ensure call time and volume stay in reasonable ranges while prioritizing customer satisfaction
All agents	Refer to up-to-date product information without using phones or other external sources	Not a training issue - knowledge base/job aids and proactive follow-up notifying of new features

AI Assist

Share your terminal objectives with an AI tool.

🤖 Ask it: *"Based on these terminal objectives, write two or three enabling objectives for each audience. Each enabling objective should describe a specific, observable behavior, not just knowledge."*

Review what it generates. Are the objectives specific and observable? Do they connect to the actual performance gap you identified? What would you change, and why?

I think they're pretty good and measurable. I'm not sure about the second one for objective 3 – I think it's fine to go from memory if the agent is confident they know it, so maybe I would specify that that case is something they wouldn't already know.

I like the objectives for managers, especially giving one thing an agent did well and one to improve.

The AI did note that since I listed the target customer service score as TBD, it was going with recommendations about improving the score in general rather than hitting a specific target.

Your Modality & Instructional Approach Decisions

For each training deliverable in your solution, identify the modality and describe how you are incorporating each of the three learning approaches. Most well-designed solutions blend all three; the proportion and emphasis will vary depending on the audience and the performance gap.

- **Behaviorism is learning by doing** (practice, repetition, feedback, and observable performance)
- **Cognitivism is learning by understanding** (building mental models, making sense of new information, and connecting new knowledge to what learners already know)
- **Constructivism is learning by exploring** (working through realistic complexity, developing judgment, and learning from experience and reflection)

Deliverable	**Webistia Service Standard training**
Audience	**New & Underperforming Agents**
Modality	Scenario-based, self-paced eLearning Course
How are you incorporating each learning approach?	
Behaviorism (learning by doing): Giving examples of call situations and having agents select the appropriate response, to simulate a real call situation, and see how their responses affect customer satisfaction. Cognitivism (learning by understanding): Explaining the tenets of the Service Standard and showing how their behavior on a call influences customer satisfaction scores. Constructivism (learning by exploring): Presenting a branching scenario that can handle different paths to resolving a customer call. Possibly using open-ended questions/prompts to think of past situations they could have applied their learnings to.	

Deliverable	Customer Service Management Training
Audience	New or underperforming call center team managers
Modality	Virtual/in-person workshop

How are you incorporating each learning approach?
Behaviorism (learning by doing): Listening to recorded calls and discussing how they'd coach the agent involved. Practicing management situations via roleplaying with facilitators and other managers. Cognitivism (learning by understanding): Explaining how coaching feedback influences agents and how that performance affects customer service scores. Making clear the balance needed between service and speed. Constructivism (learning by exploring): Putting managers into pairs or groups to discuss the subject matter, roleplay, and talk about their experience.

Deliverable	Product Info knowledge base
Audience	Agents
Modality	Job Aids/Performance Support

How are you incorporating each learning approach?
Behaviorism (learning by doing): Agents will be given access to the tool so they can use it right away on the job. Cognitivism (learning by understanding): Reducing cognitive load on agents by removing the need to memorize a lot of product information. Constructivism (learning by exploring): Agents can skim through the tool on their own to become more familiar with it. On-the-job usage will help them learn on their own.

Your Constraints

Constraints are the real-world conditions your solution has to work within. They are not obstacles to good design; they are the conditions that define what good design actually looks like in this situation. Review what you found in the Webistia story and identify the constraints that apply to your solution.

There are three categories of constraints to consider:

- **Learner constraints:** who your learners are, where they work, when they can access training, and what their context looks like
- **Content constraints:** the nature of the content itself, including how complex it is, how often it changes, and what already exists
- **Project constraints:** the realities of time, resources, team capacity, and access to subject matter experts

Constraint type	Specific constraint	How it shaped my design
Learner	Call centers need coverage so the team can't all be in training at once; high total number of agents need the training.	Using an eLearning course that can be rolled out to a large number of people and taken asynchronously
Learner	High turnover/many new hires who will need the training going forward	eLearning course can be evergreen and used for both onboarding and existing staff
Content	Frequent product changes mean information can be outdated quickly	Not having static training based on product features, instead focusing on keeping the latest info available and accessible
Project	SME access - David and Derek not always available to help	Schedule sessions ahead of time and stay flexible. Work with high-performing managers and leverage existing documentation to avoid needing David's help

Merrill's Principles of Instruction

Merrill's five principles describe what effective instruction does, regardless of modality or audience. Map your overall solution against each principle below. Each principle may show up in more than one component of your solution, so list every relevant example. Do not describe what the principle means in general; describe what you are actually doing in your design because of it.

- **Problem-Centered:** instruction is organized around real situations learners face on the job, not content topics
- **Activation:** new learning is connected to what learners already know or have experienced

- **Demonstration:** learners see what good performance actually looks like, not just a description of it
- **Application:** learners get to practice the skill in a safe environment before doing it for real
- **Integration:** learning is connected back to the real work environment after the training ends

Principle	How it shows up in your solution
Problem-Centered	Agent training addresses the problem of underperforming customer service with realistic examples. Manager training addresses the issues managers have related to agents' performance. Product info tool addresses the kinds of questions customers have or information the agents need to know.
Activation	Agent and Manager training: open with an example from on the job, something that will be familiar to them Product Info: announcement email will include reason for why it's needed
Demonstration	Agent: Videos/audio files representing real or simulated calls Manager: Facilitator walkthrough, recorded calls
Application	Agent: Quiz/interactive features Manager: Roleplay simulation
Integration	Agent: Job aids reinforce the WSS, agents apply learnings to the job Manager: Managers apply learnings to the job and have occasional check-ins

Your Design Document

A design document brings all of your design thinking together in one place. It is what you share with Rachel and David before development begins, and what you return to when scope is questioned or priorities drift. Complete each section below.

Note: The Implementation Plan and Evaluation Plan sections will be completed in Week 7 once we have covered those topics. Leave those sections blank for now and return to them.

Project Information	
Project title:	**Webistia Service Standard Training**
Project purpose: Describe the problem this project exists to solve, in plain language	Raise customer satisfaction scores to 82% average company-wide.

Roles and Responsibilities	
Role	**Name and title**
Design lead	Steve Pheley, Instructional Designer
Project owner	Rachel Kim, VP of Customer Service
Project oversight	David Chin, Director of Customer Support Operations
SMEs	Derek Walsh, Austin team manager Other managers as available

Audience, Goals, and Objectives	
Target audience: Who will receive training as part of this solution?	Agent eLearning: Recent hires, underperforming agents, and future new hires going forward Manager workshop: New/underperforming managers, with the participation of more experienced/high-performing managers. Knowledge base: All agents.

Project goal: State the overarching terminal objective for the solution as a whole	Agents will improve customer satisfaction by better understanding and implementing the Webistia Service Standard, along with improved support from their managers and up-to-date, accessible product information.
Learning objectives	After completing this training, learners will be able to: • (Agents) Handle multiple call types with improved individual service scores • (Managers) Have coaching sessions with agents to improve performance

Project Deliverables

Deliverable	Description
e-Learning Course	Can be distributed to recent hires (last 12 months) and members of underperforming teams. Includes call recordings (actual or simulated) and multiple paths for agent to handle them.
Management Workshop	Facilitated vILT session with CS managers, where instructor presents material and provides managers opportunity to practice coaching with each other.
Product Knowledge Base	A searchable Web-based tool of information on Webistia's product line, available to agents on their desktop machines. Email announcements and a Q&A webinar will help them get onboarded with this tool.

Project Milestones

Date or target	Deliverable or Task
Week 1	Kick-Off Meeting
	Design Document Signoff
Week 2	Discovery/SME meetings

	Gather content for knowledge base
Week 3	Content/storyboard development
	Manager workshop & facilitator guide outline development
Week 4	Content review
Week 5	Content revisions and approvals
Week 6	eLearning module development
Week 7	Management facilitator training
Week 8	Pilot courses and KB with test audiences
Week 9	Review pilot results, revise if necessary
Week 10	Launch training

Implementation and Measurement	
Implementation plan: Return to complete this section in Week 7	**eLearning course:** - Email to relevant managers ahead of the course launch - Email to agents ahead of the course launch - Email with course link and deadline **Manager workshop:** - Email ahead of invites - Train-the-trainer session - Calendar invites with link

Evaluation plan: Return to complete this section in Week 7	- Establish baseline performance (done) - Distribute course survey for eLearning - Distribute course survey for manager training - Check CSAT scores at 90 days, 6 months, etc. - Monitor usage of product knowledgebase
Constraints and risks: List the key constraints and risks that could affect the success of this project	- SME availability, particularly David - Manager availability to take course - Agent availability to take course - Need product info to build knowledgebase

AI Assist

Once you have completed your design document above, share the key details with an AI tool.

🤖 **Ask it:** *"Based on these design decisions, help me draft a professional design document for this instructional design project. Include sections for project purpose, audience and objectives, proposed deliverables, milestones, and evaluation approach."*

What did the AI capture well? What did it miss or get wrong about the Webistia context? What would you need to revise before sharing this with Rachel and David?

It's pretty good actually. Interesting that it came up with some details I didn't provide (like the length of the workshop or the target call length). I'd want to double-check all the assumptions and sanity-check the timeline especially before sharing it.

Week 3 Reflection

Now that you have mapped out your solution, look back at the analysis you completed in Week 2. For each major design decision you made, what specifically from the analysis points to that being the right choice? If someone asked you to defend one of your decisions to a skeptical stakeholder, which one would you feel most confident defending, and why?

eLearning course: Since it sounds like agent performance is more of a training and management issue than one of competency or attitude, and because this needs to be scalable to a large number of agents, it makes sense to do this as eLearning.

Management course: There's a clear training need for new/inexperienced/underperforming managers, and it's a small enough group that ILT makes sense. However because of geography, and in order for underperforming managers to learn from higher performers, it makes sense to do this online as vILT rather than trying to do facilitated sessions in each office separately.

Product tool: No sense in training agents for something that will change over time and that they won't be able to memorize anyway. It makes more sense to have performance support that will keep them empowered to find the right info for customers.

No training for Webistia Pro: Conversations with agents point to this being mainly an incentive issue, which training can't solve. This is a pretty easy one to defend - "don't spend the money on something that won't help, spend it on getting agents to make you more money".

Part 4: Plan the Project

Project Timeline: A project timeline breaks the work into phases and makes every task, every owner, and every deadline visible. It prevents the project from stalling because someone did not know it was their turn to act, and it makes scope changes easier to evaluate because you can see exactly what gets affected downstream.

Name each phase based on what is actually happening in it. The phases below are suggestions; adjust them to fit your solution. Add or remove rows as needed.

Project Timeline

Phase 1 — Plan the Project
The deliverable for this phase is a completed, approved **design document**.

Task	Owner	Target Date
Kickoff Meeting	Steve	Week 1
Draft design document	Steve	Week 1
Collect feedback on design document and make revisions	Steve	Week 2
Final approval of design document	Rachel/David	End of Week 2

Phase 2 — [Research]
The deliverable for this phase:

Task	Owner	Target Date
SME Meetings (x2)	Steve	Week 3
Circulate draft notes for feedback from SMEs	Steve	Week 3 end

Phase 3 — [Design]
The deliverable for this phase: eLearning storyboards, workshop outline/facilitator guide draft, knowledge base wireframes

Task	Owner	Target Date
Draft eLearning storyboards Draft manager workshop outline/fac guide Create low-fi wireframes for knowledge base	Steve	Weeks 4-5
First round feedback	Rachel/David	Week 6 beginning
Update designs with feedback	Steve	Week 6 end
Second round feedback	Rachel/David	Week 7
Final updates	Steve	Week 7 middle
Final approval	Rachel/David	Week 7 end

Phase 4 — Development
The deliverable for this phase: eLearning course and workshop guide, knowledge base

Task	Owner	Target Date
Build eLearning course	Steve	Week 8
Create workshop guides	Steve	Week 8
Develop knowledge base	Steve	Week 9
Round 1 review	Rachel/David	Week 9
Revisions	Steve	Week 9
Round 2 review	Rachel/David	Week 10
Revisions	Steve	Week 10
Sign-off	Rachel/David	Week 10

Phase 5 —Implementation
Deliverable for this phase: **launched solution**

Task	Owner	Target Date
Pilot the eLearning course	Rachel	Week 11
Pilot the manager workshop?	Rachel	Week 11
Soft-launch/pilot project info tool	Rachel	Week 11
Receive and implement feedback	Steve	Week 12
Receive and implement feedback	Steve	Week 12

Official launch email	Rachel	Week 13 beginning
Project info tool Q&A webinar	Steve	Week 15

Scoping & Assumptions

What assumptions are you making in your plan, and what is the biggest risk to your timeline if one of those assumptions turns out to be wrong?

- Assumes prompt feedback and approval (2-3 days) from stakeholders and SMEs as scheduled.
- Assumes reasonable availability from David and Derek
- Assumes near full-time availability of Steve (ID)

If these assumptions are wrong the timeline can slip.

Scope Creep Scenarios

Scope creep refers to changes or additions to a project that go beyond what was originally agreed. Not all scope creep is bad; some changes are legitimate and worth accommodating. Others will derail the project if you agree to them without thinking through the consequences.

The key skill is knowing the difference and responding in a way that protects the project without damaging the stakeholder relationship.

Read each scenario below. For each one, decide whether you would accommodate it, push back on it, or propose an alternative. Explain your reasoning, and if a change to your plan is required, describe what that change would be.

Scenario A

Three weeks into the project, Rachel sends you a message: *"I was thinking, since we are already building training for the support team, could we add a short module on our new customer privacy policy? Legal has been asking us to get something out. It would probably not take long to build."*

Is this a change you would accommodate? Why or why not? What are the implications for your timeline and your team's capacity, and how would you respond to Rachel?

I would note a couple of things up front:

- It's going to affect the timeline, at least a little
- It likely adds the legal department as a stakeholder, SME, and reviewer, potentially adding further time and complications
- It's a separate topic from the service concerns we are addressing
- It may need to be rolled out to all agents and managers and not just the new/underperforming ones

Of course I'd be open to the change and would work with Rachel to determine whether it really makes sense to do as part of this project or as a separate project once the service standard training is done.

Scenario B

After reviewing your design document, a stakeholder reaches out and suggests that one of your training solutions should be significantly more in-depth and comprehensive than what you originally scoped. They believe a more robust solution would be more effective, and they are enthusiastic about the idea.

Is this a legitimate improvement worth exploring, or a scope problem? What would you need to evaluate before giving an answer? How would you respond in a way that takes their input seriously without automatically agreeing?

I'd need to evaluate:

- Is this truly an improvement that works toward the training objectives, or is it an add-on?
- Do other stakeholders need to be on board with this change? Are they?
- How much research will be necessary? How much content needs to change?
- Any impacts to the types or modalities of training?
- How much of an impact does this have to the timeline?

I'd note this impact to the stakeholder, and suggest maybe considering it as a future improvement if the training doesn't get the results we need as it is.

Scenario C

Halfway through development, you learn that Webistia is planning to launch a new product feature in eight weeks. Rachel asks if you can update one of your training deliverables to include the new feature before it launches, since agents will need to know about it right away.

Is this a reasonable request? What does it tell you about the relationship between your training solution and ongoing product changes at Webistia? How does it affect your timeline, and how would you respond?

Since it's a product feature it will affect the product info tool but likely won't affect the agent or manager training.

Depending on the complexity of the feature and whether it affects content that's already been developed or not, the impact could be negligible or it could be significant. We know that product features and pricing change fairly frequently so this was something of a known risk, and keeping the product database up-to-date is something that should already be planned for. So this should be fairly expected, and any changes to the timeline can be communicated to Rachel. We should also make sure the feature is communicated to agents outside of the knowledge base, as they may not otherwise know to look for the new feature.

Scenario D

During a check-in call, Rachel mentions that a small group of employees who were not part of your original audience have recently taken on new responsibilities that overlap with the performance gaps you are addressing. She asks if your solution could be extended to include them as well.

Is this a reasonable addition or a scope problem? How does your original analysis inform your answer? What questions would you want to ask before deciding how to respond?

If it's just a matter of sending the eLearning to more people, that's not much of an issue at all. If they need to be involved in the management ILT that's a little more impact in terms of scheduling and resourcing but doable if that's not a big deal.

If it means changing the content, that's scope creep and timeline impact. We'd need to determine whether this is just a change of audience numbers or of content needs, and any constraints that may change the scope we've established (ex: maybe they need the management training, but can't be available for the remote ILT).

AI Assist

Share your solution components and audiences with an AI tool.

🤖 **Ask it:** *"Help me scope this instructional design project. Break it into phases, identify the key tasks in each phase, and flag any dependencies or risks I should plan for."*

What did the AI include that you had not thought of? What did it miss or get wrong about the Webistia context? What would you keep, adjust, or throw out, and why?

It thought of things like legal review of any issues with using actual recorded customer calls (probably covered by the company already but good to check) and how the product info available might be outdated. It also flagged the importance of a governance plan to keep information current.

It didn't get much wrong, but it seems to think the product info tool needs to be complete for agent training which I don't think is really the case. Likewise it makes the info tool a big dependency, when in reality it can launch after the training if it needs to.

Week 4 Reflection

Look at your project timeline. What is the single task or phase that, if it slips, creates the most downstream disruption? Why does it sit where it does in your sequence, and what would you do if it ran late?

Working with SMEs is dependent on their availability which is out of my control. It happens fairly early on, but if it runs late it will push the whole project back. I don't think it can entirely be avoided but can be mitigated by scheduling meetings way ahead of time, and possibly having alternative SMEs if the main ones become unavailable.

Part 5: Your ILT, Performance Support & OJT Design

Overview of Your Solution Components: Before getting into the details, describe which of the following components are part of your solution and why. If a component is not part of your design, note that here and briefly explain why you chose not to include it.

Instructor-led training: Is this part of your solution? If so, which audience is it for and what is it designed to accomplish at a high level?

Yes, for the manager training, to help them learn to coach their employees more effectively. Since the manager audience is relatively small and defined it makes sense for this to be (v)ILT. They'll also benefit from interacting with and learning from other managers who have been in the position longer.

Performance support: Is this part of your solution? If so, what specific on-the-job problem does it address and who is it for?

Yes, product reference/knowledge base for all agents, so they don't have to take up extra time looking up info on their phones and can more efficiently handle customer queries. Since there's no need to memorize this information and it's subject to change, it makes sense to handle this as performance support rather than training.

Also, a Service Standard job aid to reinforce the training for those who take it (or just as a reminder for those who didn't need the training).

On-the-job training or manager coaching: Is this part of your solution? If so, which audience is it for and what role does it play in the overall design?

Yes, I plan on having peer-to-peer mentorship between higher- and lower-performing managers on an ongoing basis to keep them learning from each other.

Managers will also monitor their agents' performance and coach them accordingly – which both applies the manager training, and reinforces or evaluates the agent training.

Instructor-Led Training

Instructor-led training is a live, facilitated learning experience, either in person or virtual, where a facilitator guides participants through content and activities in real time.

What is the structure of your ILT component? Describe the format, length, and audience.

Workshop for the managers, probably 2-4 hours, online as a "virtual" session so people can attend from wherever they are. A facilitator will guide the managers through training, which will include a presentation, some roleplays, and group/pair discussion.

What tool or platform are you using to design and deliver this session, for example PowerPoint, Google Slides, Miro, Mentimeter, Zoom, or Teams? How does your choice of tool shape what is possible in the session, and are there any limitations you have to design around?

I'd use Zoom so teams in different offices can communicate with each other (e.g. so the underperformers in Austin can learn from the overachievers in Phoenix).

The instructor would also likely use Powerpoint or Google Slides to guide their presentation and the overall session schedule, though likely it wouldn't be too heavily used and the session would focus more on the interactive parts.

Session flow outline

Map out the flow of your session from start to finish. For each segment, identify the type of content or activity, its purpose, and how long it will take.

Segment	Content / Activity Type	Purpose	Approx. Time
Introductions	Social	Get people settled into training	5 min
Instructor presentation	Slide deck/narration	Give background on the workshop, expectations, and what to accomplish, then into some advice on coaching agents	15 min
Q&A/discussion	Group discussion	Address any questions so far, hear people's thoughts	5 min
Call recordings	Individual + Group participation	Listen to recorded real or simulated calls, evaluate the agent's performance individually, then discuss as a group	30 min
Breakout discussions	Smaller group/pair activity	Each group has a particular situation (or multiple) that they talk through and decide how they would handle it	20 min
Breakout debrief	Group discussion	Groups present their scenarios and discuss findings	10 min
Break	Break	To have a break	5 min

Instructor presentation 2	Slide deck/narration	Advice on further management scenarios	10 min
Roleplay exercises	Pair activities	Practice coaching agents on service standards	20 min
Roleplay debrief	Group discussion	Discuss learnings from roleplay	10 min
Final thoughts/Q&A	Group discussion	Wrap up training, address lingering questions, explain reinforcement plan	10 min

How Gagne's events of instruction show up in your ILT design

For each event, describe specifically how it shows up in your session, not what the event means in general, but what you are doing in your session because of it.

Gagné's event	How it shows up in my instructor-led training
Gain attention	Instructor's introduction and comments at the beginning of presentation, mentioning how this training relates to their jobs
Inform learners of objectives	Presentation intro includes objectives so learners will know what they are expected to learn and perform
Stimulate recall of prior learning	Instructor can ask, "Has anyone had an experience where…" and talk about real situations
Present content	Facilitator presents the service standard and walks through its steps
Provide learning guidance	Facilitator gives tips on how to coach agents to implement the service standard steps
Elicit performance	Recorded call exercise and roleplay scenarios
Provide feedback	Discussions during roleplay and debrief
Assess performance	Roleplay debrief and discussion
Enhance retention and transfer	Reinforcement/follow-ups between managers

AI Assist

Describe your ILT session topic and audience to an AI tool.

🤖 **Ask it:** *"Design a realistic practice scenario I could use in this instructor-led training session. Include the setup, the situation participants face, the decision they need to make, and a debrief question."*

Does the scenario feel realistic for your Webistia audience, or does it feel too generic? What would you change and why? How would you use this as a starting point rather than a finished product?

Feels a bit generic, or even too specific for a different situation – the LLM made up its own company, characters, situation, etc. But the bones of it are good - i could likely use the structure to help develop a more Webistia-specific training by changing the relevant bits and adding my own ideas.

It also came up with a good suggestion to have two participants go through an exercise first in front of the whole group and then do breakout groups after that.

Performance Support

Performance support tools help people do their job in the moment they need to do it, during a task, not before it. A well-designed performance support tool does not require the user to remember anything. They pull it up, find what they need, and act.

What specific problem does your performance support tool solve, and what does someone need to be able to find or do in 30 seconds or less?

Provide information about all Webistia products that a support agent is likely to need.
This would likely include pricing, features, some basic tech support (I'm assuming more complex things would be escalated to a more technical support tier).

Agents should be able to find the answer to a customer's question (or other things they don't know) within 30 seconds.

What format are you choosing, and why does that format fit how and when people will actually use it on the job?

I'm envisioning a web-based product info center, with search options (maybe even chatbot?)
It will be available on agents' desktops where they do their other work so it will be in front of them to use while on a call.

What tool or platform are you using to build this, for example Word, InDesign, a web page, a shared drive document, or something inside your LMS? How does that choice affect how the tool can be accessed, updated, and used on the job?

I think it would be a small custom intranet site, likely built in Claude Code or Design.
I'd come up with a schedule for updating cadence and work with the product team to get that done. Since it's web-based and digital, it can be updated frequently and can be accessed anywhere. It could conceivably be a subset of the main company web site or leverage data/content that lives there.

How does this tool connect to the rest of your solution? Is it introduced during training, distributed separately, or something else?

It would be distributed separately, likely with an email memo and an explainer video. I am also thinking of having a webinar maybe a week or two after launch to see if people have questions and get some informal feedback.

Ideally there would also be a brief pilot phase for a more limited audience. This doesn't need to be too extensive, though; the tool should be pretty straightforward and intuitive.

On-the-Job Training & Manager Coaching

On-the-job training refers to learning that happens through doing the actual work, with structure, support, and feedback built in. It is different from formal training because the learning happens in the real work environment, not in a classroom or an eLearning module

What does structured on-the-job learning look like in your solution?

Touchpoint	Who owns it	When it happens	What happens during it
Manager call review	Managers	Monthly? Biweekly?	Managers listen to an agent's call
Manager/agent 1:1	Managers	After call reviews	Managers give feedback to agents
Manager peer sessions	David Chen/Managers	Periodically (every 60 days?)	Match lower-performing to higher-performing managers to share tips and mentorship

What tools or resources does a manager need to coach effectively in your solution, and how does your design account for managers like Derek Walsh who have never been formally trained to give coaching feedback?

The ILT session is an opportunity for managers like Derek to receive the formal training they haven't had before. It may make sense to consider job aids to reinforce the training.

Presumably software tools (call monitoring, Zoom) are already in place; the main thing managers need is time and encouragement to schedule 1:1 sessions with each of their agents if they don't have them already, as well as mentorship sessions with peer managers.

How does this component connect to adult learning theory? What specific principles are behind the way you have structured the on-the-job experience?

From the Knowles principles, this builds on their job experience, and engages learners in their own learning. It is also oriented around a problem they have (meeting metrics).

The 1:1 check-ins also incorporate the principle that training should be reinforced over time.

Week 5 Reflection

Pick one design decision you made this week, for any component, and explain why it is the right call given the specific audiences and constraints in this scenario. What would a weaker version of that decision have looked like?

Doing the manager training as ILT and OJT is the right call because the participants are a manageable (haha) number of people and because the problem being addressed is an interaction one that can and should be talked out.

A weaker version would be to do it as an eLearning course, where it would be hard to give them actual practice in coaching their agents.

Part 6: Your eLearning Design

Overview of Your eLearning Components: Before getting into the details, describe the eLearning components that are part of your solution. How many modules are you designing, who is each one for, and what is each one trying to accomplish at a high level? If eLearning is not part of your solution, explain why you chose not to include it.

I'm using eLearning for the agent training course. Since it's based on the Webistia Service Standard which has five steps, that will drive the structure somewhat – five lessons might be a bit much to throw at people all at once, especially when they also have to do their jobs too - so maybe I'd split it into two parts. Each lesson would walk them through the reasoning for the step and give advice on how to do it, with a short quiz at the end. Then after all of it I'm thinking of a larger, more interactive assessment which will encompass all of the steps.

What authoring tool are you using to build your eLearning, for example Articulate Storyline, Articulate Rise, Adobe Captivate, iSpring, or another tool? Describe what that tool enables you to do and what constraints it places on your design. Consider things like the types of interactions available, branching capabilities, media support, accessibility features, and how the finished product will be delivered to learners.

Lately I have been working with Claude Code to build standalone courses so my inclination is to keep doing that rather than using a specific tool. For the interactive assessment I'd map the logic out in TWINE, which is built for handling branching storytelling, and implement it with Claude.

One concern to watch out for is maintainability – if another ID wants to update things later, standalone HTML/CSS/Javascript might not be ideal. I would likely look to my manager for some guidance about this.

Another concern is LMS compatibility - Claude seems "confident" it can do SCORM compliance but this will require a little testing.

Module Design

Complete the sections below for each eLearning module in your solution. If you have more than one module, copy and complete this section for each one.

What is this module trying to accomplish? What should someone be able to do differently on the job after completing it, and how does that connect back to your original performance goals?

After completing the module, the agent should be able to apply the Webistia Service Standard and its five steps to all customer service calls, which should result in increased customer satisfaction and therefore higher CSAT scores overall.

The learning module goes over the steps and evaluates progress via quizzes and interactive practice.

Is your module topic-driven or story-driven, and why is that the right approach for this content and audience? Topic-driven means the module is organized around content topics, moving through information in a logical sequence. Story-driven means the module is organized around a narrative, scenario, or character journey that carries the learner through the content.

A little of both. I envision the five steps being introduced and handled in a topic driven manner, although they may interconnect as part of a story as well. The interactive assessment would definitely be more story-driven and form one or more overall narratives of hypothetical service calls with branching paths.

Module flow outline

Map out the sequence of your module from start to finish. For each screen, identify the screen type, what it contains or accomplishes, and what the learner is doing

Screen	Screen Type	Content or Purpose	What the learner does
Introduction	Title / Intro S...	Welcome the user and inform of course objectives.	Read
The Webistia Customer Service Standard	Presentation ...	Introduce the five elements of the WSS	View and absorb the presentation
Step One: Open with Warmth	Video	Explain the concept and give examples of how to use it	View video
Step Two: Discover the Need	Video	Explain the concept and give examples of how to use it	View video
Step Three: Resolve the Issue	Video	Explain the concept and give examples of how to use it	View Video
Knowledge Check	Knowledge C...	Test user's understanding of the first three steps	Take quiz
Step Four: Check for Completeness	Video	Explain the concept and give examples of how to use it	View Video

Step Five: Close with Care	Drag-and-Dr...	Explain the concept and give examples of how to use it	View Video
Simulation	Branching Sc...	Test agent's understanding of the five steps with a branching scenario simulating a customer conversation	Listen to simulation and choose responses
Conclusion	Summary	Wrap up the module(s)	Read
Complete!	Completion ...	Lets the user know they've finished the course and any next steps	Celebrate heartily

Your Key Interaction

Every effective eLearning module has at least one moment where the learner has to do something that actually matters, a decision point or interaction that puts them in a realistic situation and asks them to apply what they are learning. Describe that moment for your module below.

Who is the learner playing, and what situation are they in?
The learner is playing an agent like themselves. They will be asked to deal with a few different call situations (an easy call, a confused caller, an irate caller etc.).
What decision or action do they face?
They are presented with an audio or video simulation of a customer question, complaint, or other situation, and need to decide how to respond.
What choices or actions are available to them?
They have choices of how to respond to the customer.
What happens as a result of each choice?
The conversation continues, with the customer either becoming happier or not depending on the choices.
What does this interaction accomplish in terms of learning?
It measures agents' understanding of how to interact with customers and handle whatever issues come up, and allows them to practice in a simulated situation.

AI Assist

Describe your module topic, audience, and performance goal to an AI tool.

🤖 **Ask it:** *"Write a branching scenario for this eLearning module. Include a realistic situation, two or three decision points, and the consequences of each choice."*

Does the scenario put the learner in a realistic, meaningful situation, or does it feel generic? Are the decision points genuine judgment calls your audience actually faces on the job? What would you change and why?

I think it's pretty good - given the past context from previous exercises it came up with a pretty applicable scenario (developer has borked the domain nameserver settings and is now unreachable). It also came up with some good scenarios for if things go wrong.

Applying Gagne's Events

For each event, describe specifically how it shows up in your module, not what the event means in general, but what you are doing in your module because of it.

Gagné's event	How it shows up in your module
Gain attention	Use familiar scenario (“Imagine the last time a customer said…”)
Inform learners of objectives	Introduction screen lets them know what they will be learning and how it will improve metrics
Stimulate recall of prior learning	Reminding of the WSS steps in presentations/videos
Present content	Screens, videos present that WSS steps
Provide learning guidance	Show example of how interactive scenario works
Elicit performance	Knowledge checks/simulation
Provide feedback	Responses in simulation illustrate whether the response was the best one or not.
Assess performance	Score on knowledge checks and simulation
Enhance retention and transfer	Managers will coach the agents going forward Provide WSS job aid to print ?

AI Assist

Share your module topic and a brief description of your content with an AI tool.

🤖 **Ask it:** *"Map Gagne's nine events of instruction to this eLearning module. For each event, describe specifically how it could show up in this content."*

Where did the AI's suggestions strengthen or challenge your thinking? Where did it miss something important about your specific audience or context? Which suggestions would you use, and which would you set aside?

The AI responses were more fleshed out than my quick notes above and got into more examples that can help guide my design.

It suggests starting them right into a scenario with a customer's voice, though, "a deliberate choice to make the stakes feel real before the framework is even named" - and I'm not sure I'd go that way. I'd want to ease people into the training rather than jumping in like that.

Applying Mayer's Multimedia Principles

Mayer's multimedia principles are research-based guidelines for how to present information in a way that reduces cognitive overload and supports learning.

For each principle below, describe the specific design decision you are making because of it. If a principle does not apply to your module, note that and briefly explain why.

Mayer's principle	What it means	Your design decision
Multimedia principle	People learn better from words and pictures together than from words alone	Visuals - images, charges - and videos
Coherence principle	People learn better when extraneous material is excluded, even if it is interesting	Keeping the intro brief and keeping the overall structure centered around the WSS steps
Signaling principle	People learn better when cues highlight the organization and key ideas of the material	Organized around the 5 steps
Redundancy principle	People learn better from graphics and narration than from graphics, narration, and on-screen text combined	Having captions available for accessibility purposes but turned off by default
Spatial contiguity principle	People learn better when corresponding words and pictures are placed near each other on the screen	Designing layout with visuals (caller images?) and associated text
Temporal contiguity principle	People learn better when corresponding words and pictures are presented at the same time rather than in sequence	Using video with audio synced to it
Pre-training principle	People learn better when they already know the names and characteristics of the main	Intro screen - also they have encountered the WSS at some point.

	concepts before the lesson begins	
Modality principle	People learn better from graphics and spoken narration than from graphics and on-screen text	Having narration instead of captions
Personalization principle	People learn better when words are in a conversational style rather than a formal style	Keeping the tone natural and not lecturing.

Week 6 Reflection

How does the instructional approach you chose for your eLearning module connect back to the root cause you identified for this audience in your analysis? Why is this approach better suited to the performance gap than a simpler content-and-quiz design would be?

The analysis suggested that the agents hadn't really been trained or reinforced in the key customer service concepts espoused by Webistia. Having them learn about these and then practice them in a simulated call scenario works better than just throwing the content out there and having a quiz that tests memorization rather than application.

Part 7: Implementation & Evaluation

Now that you have covered implementation and evaluation, return to your design document and complete the Implementation Plan and Evaluation Plan sections you left blank in Week 3.

Implementation Plan

Implementation refers to how your solution actually gets delivered to the people who need it. A strong implementation plan thinks beyond logistics; it considers communication, timing, and what needs to be in place for the training to land well.

How does each component of your solution reach its intended audience?

Deliverable	Audience	How it is delivered	When	Who is responsible
eLearning Course	Pilot audience	LMS/email link	When course is available	Rachel
eLearning Course	Full audience (new/under-performing agents)	LMS/email link	After pilot, 30 days before deadline to take training	Rachel
Manager workshop	Managers	Email ahead of invite + calendar invite	2 weeks before	David
Knowledge Base	Agents	Rollout to internal servers	Pilot launch, then full launch a week later	Steve/IT

Are there any audiences or locations that need a different rollout approach? What adjustments are you making and why?

Locations with no new or underperforming agents don't need the eLearning.
Managers should be able and encouraged to access the eLearning so they will understand what their employees will be doing. This could be done at the pilot stage, but it risks involving "too many cooks" giving feedback, so it might be better to give them a separate communication and preview after the pilot and before the full rollout. That will also be an opportunity to reinforce the importance of having their teams complete the training and get them on board with it.

Communication plan: who needs to know what before anything launches?

Audience	What they need to know	When	How
Managers	Agent training is coming	1 weeks before eLearning launch	Email
Agents	Agent training is coming	3 days before eLearning launch	Email
Agents	Agent training is launched	Launch day	Email
Managers	Manager training is coming	4 weeks before launch	Email
Managers	Manager training is scheduled	2 weeks before training	Calendar invite

Agents	Knowledge base is available	Email + webinar	Launch day

Evaluation Plan

Evaluation is how you find out whether the training actually worked, not just whether people completed it, but whether performance changed and business results improved.

Using Kirkpatrick's four levels, describe how you will evaluate your solution:

Level	What you are measuring	How you are measuring it	When
Level 1: Reaction	Did people find the training helpful and applicable	Surveys	Shortly after course/workshop taken
Level 2: Learning	Did people understand the material	Quizzes	End of course
Level 3: Behavior	Are people putting the Webistia Standard into action?	Manager oversight	In the weeks and months following course completion
Level 4: Results	Are CSAT scores improved?	Data analysis	90 days, 6 months, etc.

How does your evaluation plan connect back to the original business goals?

Business goal	How does your evaluation plan measure progress toward it?
Customer satisfaction scores from 74% to 82%	Measures people implementing the steps and measures changes in the customer satisfaction scores
Pro sales through the support team from $970K to $1.2M	Not training per se, but analysis of sales data will confirm whether sales via the support team are increasing

If your evaluation data at 60 days showed one component was not working, what would you do? Walk through your process for deciding what to adjust, and explain how that reflects the iterative nature of instructional design.

1) Understand what metrics show there's a problem - low completion rates? CSAT scores? Low compliance? Is it specific to an office/team (*Derek!*) or does it vary by learner?
2) Examine the relevant parts of the training, brainstorm and get feedback on what's not working and how it could be improved
3) Make changes iteratively and pilot in future training sessions, maybe A/B Test

AI Assist

Share your solution components and the original Webistia business goals with an AI.

🤖 **Ask it:** *"Using Kirkpatrick's four levels of evaluation, suggest specific ways I could measure the effectiveness of this training solution, including what to measure, how to measure it, and when."*

Which measurement approaches would you actually use? What did the AI miss, particularly at Levels 3 and 4 where the connection to business outcomes matters most? Rachel told you the CEO will ask about customer satisfaction scores and Pro sales numbers, not course completion rates. Does the AI's plan pass that test? Does yours?

I think it did an overall good job. It used the main metric I'd expect - CSAT score - and also came up with some I hadn't heard of for things like call volume, that may not be explicitly what the CEO wants but can be useful to measure. It didn't get bogged down in course-specific stuff like completion rates.

Return to your design document now and complete the Implementation Plan and Evaluation Plan sections.

Week 7 Reflection

Looking at your evaluation plan, what is the hardest outcome in your solution to actually measure, and why? What would you do to get as close to that measurement as possible given the constraints you identified earlier in the project?

I think the impact of the knowledge base is harder to measure as it will likely have a less direct impact on CSAT scores and scores won't necessarily be traceable to the impact of product knowledge. I think this may be where call time/volume is useful to check, and maybe if we can measure "dead air" on the call too, to see if things are picking up. We'd also have usage stats from the knowledge base's web analytics, so we can measure whether people are using it and get an idea of whether they're finding answers quickly.

Part 8: Reflection

What is the single most important thing you learned from working through this project, not a concept you studied, but something you actually internalized by doing the work?

That we're solving a performance problem, and it may not be a training problem.

This should have been more obvious to me, because I think I tend to be problem-centered, but my past experience in ID was more of the "order-taking" variety, and also because it was training on a new system which is a little different than having a performance problem to solve.

There are more tools in our toolbox than just eLearning, or training at all.

Before this program, how might you have responded to Rachel's original request? What would you have built, and what would have been wrong with it?

Probably would have just built the eLearning courses like she suggested, which wouldn't have addressed the incentive issue with Webistia Pro at all and wouldn't have gotten to the root of the management issue.

Which design decision are you most confident in, and what evidence from the analysis makes you stand behind it?

I think the manager workshop. It's not as straightforward as an eLearning course but I think having them learn from peers is a big help. We know there are high-performing offices so it makes sense to leverage that knowledge and expertise in training the people who need the help. And higher performers can always learn from others as well — it's a two-way street that could pay off beyond addressing the problem.

Which decision would you most want to revisit if you had more time or more information, and what specifically makes you uncertain?

I'd maybe like to explore other options in addition to the eLearning for agent training. I think it is a good solution, but fundamentally if people are training in dealing with live people, it would make sense to have them train more with actual people, either roleplaying internally or taking on monitored calls with a manager present, or something.

You used AI at several points in this project. Describe at least two of those moments. What did you ask, what did it give you, and what did you have to evaluate or push back on? What does that tell you about how AI fits into your practice as a designer?

Overall I thought the AI results were pretty useful and impressive but not perfect or complete. LLMs are great at getting you from a blank page/screen to a first draft, but it takes natural intelligence to refine, expand, or make cuts as necessary to get to a finished product. I thought its attempts at timelines and training outlines were both great starting points for further thought.

I'm generally pro-Claude for code and limited design work, but I'm still iffy on LLMs when it comes to some areas of knowledge work, and also the business is very unstable right now so I don't want to get too attached. But for now, $20/month for Claude Pro beats $1500/year for Articulate easily.

What was the hardest part of this project?

Thinking through all the things that needed to happen – the SME sessions, review handoffs, revisions, different content builds, all of the implementation communications and evaluations – it's a lot to imagine especially when building three different things at once.

What are you most proud of?

I like my idea of an interactive simulation for the agent eLearning. I have been playing with something similar for a portfolio project so I'm trying not to let it be the hammer that makes everything look like a nail, but I think it could make for some engaging and useful training.

When you look at this case study as a whole, what do you most want a future employer or client to understand about how you approach instructional design? Write this as if you are speaking directly to someone reviewing your portfolio.

I don't have a ton of formal experience in ID, and what I do have comes from contract work in an environment where modalities, subject matter, and even things like document design and language were prescribed by the client and out of my control. I was also a temporary contractor and didn't have visibility to post-launch metrics or reinforcement. So I don't have a lot of work I can point to and say, "Look at this creative thing I did, start to finish, for a real-world project that I am really happy with, and here are the metrics that prove impact."

But I am someone with a lot of background in different roles involved in digital experiences, so I'm very familiar with working in cross-functional teams and managing expectations of different stakeholders to build something that meets business goals while being usable and engaging for its audience. I am someone who likes to dig into a problem and find the best way to solve it. I don't have much of an ego, and I'm not territorial, so if someone else has a b etter idea than I do I'm happy to use it.