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# TRAINING PLAN: PROSPECTIVE MEMBER CALL OVERFLOW

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# Project Summary

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Domestic call center temporary representatives are being asked to handle prospective International Individual and Family member overflow calls. Domestic representatives will need to explain:

- What an International Individual and Family plan?
- What are they eligible for based on citizenship and residency?
- Where to direct the member to find additional information.

Training plan will leverage eLearning, a practice simulation and bridging strategies to accomplish this goal.

# Needs Assessment

## Project Parameters & Constraints

<i>Budget</i>	TBD
<i>Timeline for completion</i>	30 minutes
<i>Sponsor</i>	Domestic Call Manager
<i>Purpose</i>	To train temporary Domestic Call Center Representatives to handle overflow calls from prospective Aetna International Individual and Family members.
<i>Performance goals</i>	<ol style="list-style-type: none"> <li>1. First call closure for basic International overflow calls</li> <li>2. Accurate call routing for International overflow calls</li> </ol>
<i>New program?</i>	Yes
<i>Based on current or anticipated performance problem?</i>	Anticipated need
<i>Job / content documentation exists?</i>	TBD

## Design & Development Parameters & Constraints

<i>Deadlines</i>	TBD
<i>Preferred launch date</i>	TBD
<i>Similar programs in place?</i>	No
<i>Will managers / supervisors / coaches participate as learners?</i>	No
<i>Technological constraints</i>	LMS availability unknown Deployment method unknown
<i>Software available</i>	Recommendation part of design
<i>Types of media possible</i>	PC available for each learner, media can include: PPT, documents, video, web, social
<i>Group or individual instruction preferred?</i>	Either
<i>Facilitated or unfacilitated?</i>	Either, if SME facilitator
<i>Local or distance preferred?</i>	Local

## Delivery Parameters & Constraints

<i>Who are learners &amp; how many?</i>	Domestic Temporary CSRs; 50
<i>Learner location?</i>	Onsite
<i>When is the program planned?</i>	TBD
<i>Classroom location available?</i>	Conference or classroom room with seating for 24
<i>Self-directed learning allowances</i>	30 minutes allotted
<i>Bridging strategy</i>	Desk reference job aid, eLearning & manager Q&A
<i>Training facilitator available?</i>	Unknown

## Job Parameters & Constraints

<i>Target population broad or specific?</i>	Specific - Domestic Call Center Representatives
<i>Performance changes desired?</i>	Knowledge & actions
<i>Potential delays in schedule?</i>	TBD; delays tied to scheduling for time off phones

## Strategy Framework

Individual	Group
Facilitated	Unfacilitated
Local	Remote
Synchronous	Asynchronous

## Strategy Conclusion

Since the availability of a training facilitator is unknown, recommendation is to build eLearning modules reviewing skills & knowledge required for taking International overflow calls and an immersive learning simulation game to practice scenarios for handling calls.

These activities can be completed independently, but ideally within the classroom with the Domestic Call Center Manager overseeing and a facilitating a debrief question & answer session immediately following the activities. Facilitated eLearning delivery is contingent upon assessment from workforce management team.

Deliverables are able to be reused for future overflow call initiatives, turnover, refresher training or International call center new hire training.

# Design

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## Assumptions

### Technology

- All learners have access to LMS to access eLearning modules.
- eLearning development software available for development effort:
  - Camtasia
  - Articulate Storyline
  - Adobe Creative Cloud Suite

### Resources

- Access to call recordings of most common international call scenarios that will be directed to domestic representatives.
- Budget to record call scenarios with different language accents  
(<https://www.voquent.com/rates/#Examples>)
- Course materials are unavailable to re-use from International Call Center and must be developed
- SME available to validate and obtain content

## Design Ratio Estimations

<i>Assessment</i>	10:1
<i>Analysis</i>	30:1
<i>Development</i>	eLearning 200:1 Simulation 500:1 Job aids - single 3:1
<i>Implementation / Evaluation</i>	10:1

## Learning Plan

<i>Project title</i>	Prospective International Member Call Overflow
<i>Project Sponsor</i>	Domestic Call Center Manager

### Goals

<i>Business Goal</i>	Assist International Call Center with handling prospective member overflow call volume.
<i>Performance Goal</i>	90% First call closure for basic International overflow calls 90% Accurate correct call routing for International overflow calls
<i>Learning Goal</i>	Ability to explain to callers what an International Individual and Family plan is, what International Individual and Family plans a member is eligible for based on where they are a citizen, and direct prospective International members to see more detailed information regarding plan benefits.

### Learners

<i>Who?</i>	Temporary Domestic Call Center Representatives
<i>How Many?</i>	50
<i>Location(s)</i>	One location (unknown)

### Content Resources

<i>Existing documentation</i>	<a href="http://www.GreatDocumentation.com">www.GreatDocumentation.com</a>
<i>Designated SME &amp; Area of expertise</i>	TBD

### Design & Development resources

<i>Designer</i>	TBD
<i>Developer</i>	TBD
<i>Resources</i>	Storyline: Simulation Game Camtasia: micro-learning videos Adobe Creative Cloud: Asset creation

## Implementation Resources

<i>Facilitators</i>	Unknown
<i>Supervisors</i>	Domestic Call Center Manager
<i>Other</i>	Help Desk resources for technical issues

## Learning Scope

<i>Proposed Course</i>	Handle International Prospective Member Calls
<i>Instructional Strategy</i>	eLearning Micro-learning modules Immersive Learning Simulation Game Call Routing Job Aid
<i>Media</i>	Audio, Animation, Interactive graphics
<i>Test date</i>	TBD
<i>Implementation date</i>	TBD

## Facilitated eLearning

<i>Duration</i>	30 Minutes
<i>Class Size</i>	12 or 13*
<i>Number of sessions</i>	4 (2 classes of 12; 2 classes of 13) *
<i>Classroom requirements</i>	Seating for 14 Each desk has PC with connection to eLearning location Headphones
<i>Distribution</i>	LMS
<i>eLearning activities</i>	Micro-learning modules Simulation game
<i>Technical requirements</i>	Chrome browser Audio / Video enabled Headphones Flash plugin
<i>Facilitator</i>	Domestic Call Center Manager
<i>Technical Support</i>	Help Desk
<i>Job Aids</i>	Call Routing Job Aid

*\*Dependent on workforce management scheduling requirements*



## Bridging

<i>Stand Alone Job Aid</i>	Call routing map outlining: <ul style="list-style-type: none"><li>• Caller type (member)</li><li>• Location</li><li>• Inquiry</li><li>• Call routing location</li></ul>
<i>Refresher</i>	Available on LMS to retake as needed: <ul style="list-style-type: none"><li>• eLearning Modules</li><li>• Simulation Game</li></ul>
<i>Coaching</i>	Manager will be onsite to provide coaching as needed.

## Evaluation

<i>Knowledge Check Results</i>	Each micro-learning video will include knowledge checks. Results will be sent to LMS for reporting and tracking.
<i>Survey</i>	After the learning event, all attendees will receive an evaluation to provide feedback on how the event prepared them for the calls.

## Project Budget by Phase

Resource	Assess	Analysis	Design & Develop	Implementation
Call Center Rep Time (\$14.50 per hour) • SME involvement • Learning event participation	-	-	\$72.50 (5 hrs.)	\$362.50 (25 hrs.)
Call Center Manager Time (\$31.50 per hour) • Project oversight • Facilitation	-	\$189.00 (6 hrs.)	\$63.00 (2 hrs.)	\$63.00 (2 hrs.)
Instructional Designer Time (\$28.36 per hour)	141.80 (5 hrs.)	\$425.40 (15 hrs.)	\$3,866.41 (136.3 hrs.)	\$85.08 (5 hrs.)
Voice Recording Services (30 mins professional recorded audio)	-	-	\$938.71	-
Stock Images (Adobe stock credits)	-	-	\$250.00	-
<b>Total</b>	<b>\$41.80</b>	<b>\$802.90</b>	<b>\$5190.62</b>	<b>\$567.30</b>

**Total project cost: \$6,702.62**

## Model of Performance Additions

Responsibility	Ability	Component	Skills & Knowledge
<b>Customer service</b>	Greet callers	International Caller greeting	<ul style="list-style-type: none"> <li>• Salutation</li> <li>• Identify yourself</li> <li>• Identify caller</li> <li>• Ask how you can assist</li> </ul>
		Engage Language Line	<ul style="list-style-type: none"> <li>• Advise caller of language line options</li> <li>• Identify language needed</li> <li>• Call language line</li> <li>• Select appropriate language</li> <li>• Merge calls</li> </ul>
<b>Member Eligibility</b>	Advise International prospective Individual & Family plan members	Review International Plan purpose	<ul style="list-style-type: none"> <li>• Ask if prospective member is familiar with International plans</li> <li>• Explain International plan purpose</li> <li>• Explain International plan types</li> </ul>
		Request International eligibility information	<ul style="list-style-type: none"> <li>• Ask client for their country of citizenship</li> <li>• Ask client for their country of residency</li> <li>• Ask client for the age of subscriber</li> </ul>
		Advise International plan options	<ul style="list-style-type: none"> <li>• Review American Citizen / living abroad plan options</li> <li>• Review International Citizen plan options</li> </ul>
		Determine International call routing	<ul style="list-style-type: none"> <li>• US citizen, how to direct for:                             <ul style="list-style-type: none"> <li>• Instant quote</li> <li>• Plan overview document</li> <li>• Coverage information</li> <li>• Sales</li> </ul> </li> <li>• International Citizen, how to direct for:                             <ul style="list-style-type: none"> <li>• Quote</li> <li>• Plan coverage information</li> <li>• Plan overview document</li> <li>• Sales</li> </ul> </li> <li>• Live chat</li> </ul>
		Transfer calls	Transfer International caller

## Course Outline

Course	Module	Lesson	Teaching Points	Delivery Method	Time
<b>Customer Service</b>	Call Handling	International Caller greeting	<ul style="list-style-type: none"> <li>• Salutation (Good Morning / Evening)</li> <li>• Introduction</li> <li>• Identify caller</li> <li>• Ask how you can assist</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning</li> <li>• Knowledge Check</li> </ul>	2 mins
		Engage Language Line	<ul style="list-style-type: none"> <li>• Advise caller of language line options</li> <li>• Identify language needed</li> <li>• Call language line</li> <li>• Select appropriate language</li> <li>• Merge calls</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning</li> <li>• Knowledge Check</li> </ul>	2 mins
<b>Member Eligibility</b>	Prospective International Individual & Family plan members	Review international Plan purpose	<ul style="list-style-type: none"> <li>• Ask if prospective member is familiar with International plans</li> <li>• Explain International plan purpose</li> <li>• Explain International plan types</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning</li> <li>• Knowledge Check</li> </ul>	2 mins
		Request international eligibility information	<ul style="list-style-type: none"> <li>• Ask client for their country of citizenship</li> <li>• Ask client for their country of residency</li> <li>• Ask client for the age of subscriber</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning</li> <li>• Knowledge Check</li> </ul>	2 mins
		Advise international plan options	<ul style="list-style-type: none"> <li>• Review American Citizen / living abroad plan options</li> <li>• Review International Citizen plan options</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning</li> <li>• Knowledge Check</li> </ul>	3 mins
		Determine international call routing	<ul style="list-style-type: none"> <li>• US citizen, how to direct for:                             <ul style="list-style-type: none"> <li>• Instant quote</li> <li>• Plan overview document</li> <li>• Coverage information</li> <li>• Sales (call transfer)</li> </ul> </li> <li>• International Citizen, how to direct for:                             <ul style="list-style-type: none"> <li>• Quote (call transfer)</li> <li>• Plan coverage information</li> <li>• Plan overview document (call transfer)</li> <li>• Sales (call transfer)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• eLearning</li> <li>• Knowledge Check</li> <li>• Job Aid reference</li> </ul>	3 mins

Course	Module	Lesson	Teaching Points	Delivery Method	Time
<b>Customer Service</b>	Call Routing	Transfer international caller	<ul style="list-style-type: none"> <li>• US Citizen living abroad Sales team lines</li> <li>• International citizen Sales team lines</li> <li>• Live chat</li> </ul>	Job Aid reference	1 min
<b>Practice exercise</b>			<p>Caller scenarios:</p> <ul style="list-style-type: none"> <li>• US Citizen caller <ul style="list-style-type: none"> <li>○ Eligibility</li> <li>○ Plan options</li> <li>○ Routing</li> </ul> </li> <li>• International caller <ul style="list-style-type: none"> <li>○ Eligibility</li> <li>○ Plan options</li> <li>○ Routing</li> </ul> </li> </ul>	Simulation Game	10 mins
<b>Bridging</b>			<p>Review resources available for support:</p> <ul style="list-style-type: none"> <li>• Job Aid</li> <li>• eLearning (refresh as needed)</li> <li>• Manager coaching</li> </ul>	Manager Q&A LMS	5 mins
				<b>Total:</b>	<b>30 mins</b>

# Lesson Sample: Determine international call routing



International Prospective Member Call Routing

BEGIN

Design by Dawn Sikorski | Graphics by Vecteezy.com

0:35/1:45

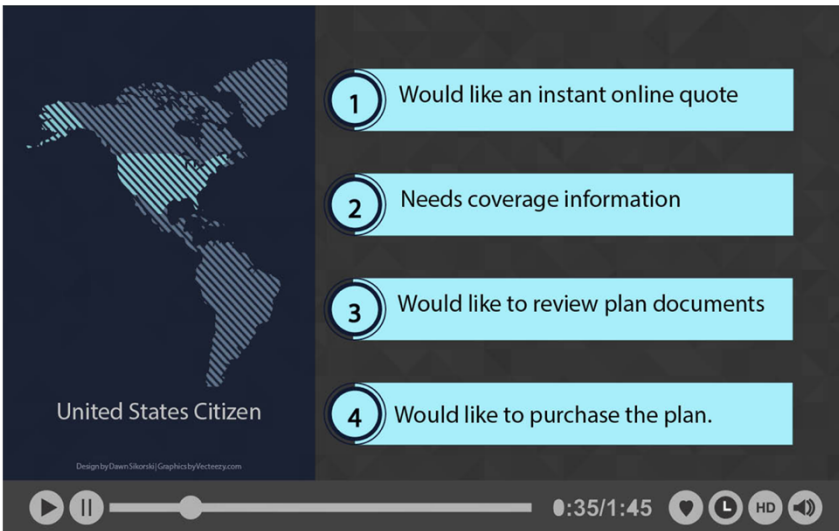


United States Citizen

International Citizen

Design by Dawn Sikorski | Graphics by Vecteezy.com

0:35/1:45

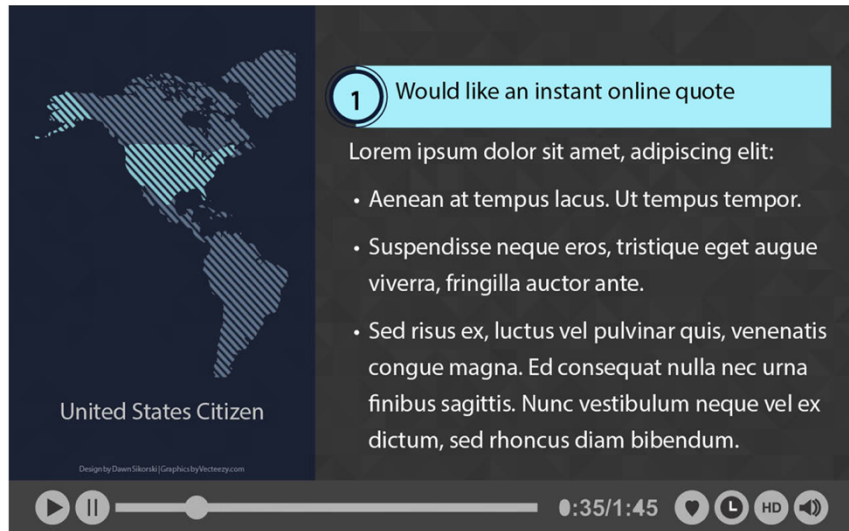


United States Citizen

Design by Dawn Sikorski | Graphics by Vecteezy.com

- 1 Would like an instant online quote
- 2 Needs coverage information
- 3 Would like to review plan documents
- 4 Would like to purchase the plan.

0:35/1:45



United States Citizen

Design by Dawn Sikorski | Graphics by Vecteezy.com

- 1 Would like an instant online quote

Lorem ipsum dolor sit amet, adipiscing elit:

- Aenean at tempus lacus. Ut tempus tempor.
- Suspendisse neque eros, tristique eget augue viverra, fringilla auctor ante.
- Sed risus ex, luctus vel pulvinar quis, venenatis congue magna. Ed consequat nulla nec urna finibus sagittis. Nunc vestibulum neque vel ex dictum, sed rhoncus diam bibendum.

0:35/1:45

## Job Aid Sample: Call Routing Reference

Citizenship?	<b>United States</b>			<b>International</b>	
<b>Country of Residence?</b>	United States	<ul style="list-style-type: none"> <li>• Sudan</li> <li>• Cuba</li> <li>• Crimea</li> <li>• Iran</li> <li>• North Korea</li> <li>• Syria</li> </ul>	All Other countries	All other countries	<ul style="list-style-type: none"> <li>• Sudan</li> <li>• Cuba</li> <li>• Crimea</li> <li>• Iran</li> <li>• North Korea</li> <li>• Syria</li> </ul>
<b>Plan Types available</b>	Domestic plans only.	<b>Not eligible.</b>	<ul style="list-style-type: none"> <li>• MHP Classic</li> <li>• MHP Exclusive</li> </ul>	Platinum, Gold, Silver, Bronze	<b>Not eligible.</b>
<b>Additional Inquiries?</b>					
<i>Quote</i>	Get an instant quote on click: <ul style="list-style-type: none"> <li>• Individuals &amp; Families</li> <li>• I'm ready to get a quote</li> </ul>			Transfer to sales: UK +44 (0)844 123 9876 US Toll Free +1 800-123-4567	
<i>Plan overview document</i>	Get plan info on click: <ul style="list-style-type: none"> <li>• Individuals &amp; Families</li> <li>• I'm a citizen of the Americas and want international healthcare coverage</li> <li>• Take a closer look at the plan</li> </ul>			Transfer to sales: UK +44 (0)844 123 9876 US Toll Free +1 800-123-4567	
<i>Coverage</i>	Get plan info on click: <ul style="list-style-type: none"> <li>• Individuals &amp; Families</li> <li>• I'm a citizen of the Americas and want international healthcare coverage</li> </ul>			Get plan info on <ul style="list-style-type: none"> <li>• Individuals &amp; Families</li> <li>• I am a citizen from a country outside of the Americas and want international healthcare coverage</li> </ul>	
<i>Purchase</i>	Transfer to sales: US +1 800 123 2177                      London +44 844 963 9037 Hong Kong +852 2888 8099            Singapore +65 6598 8599 Dubai +971 4 4387895                    Indonesia +62 55 1234 9652			Transfer to sales: UK +44 (0)844 123 9876 US Toll Free +1 800-986-7654	

# Practice Samples: Simulation Game

