



Orlando Utilities Commission

Customer
Experience
Training &
Quality Analyst
Proposal

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Table of Contents

- Infrastructure Training Development..... 3
- A. Requirement 1.1 - Present Vendors for Customer Experience Training & Quality Analysis.... 3
- B. Requirement 1.2 - Vendor Pro et Contra 6
- C. Requirement 1.3 - Training Analysis Best Practices 8
- D. Requirement 1.4 - Define Teaching Outline & Instructional Methods..... 10
- E. Requirement 1.5 - Business Use Analysis 12
- F. Requirement 1.6 - Implementation Timeline 13
- G. Requirement 1.7 – Relevant Data/Measuring Performance Metrics 14
- H. Key Personnel - Brenna Droege Resume..... 15

Infrastructure Training Development

A. Requirement 1.1 - Present Vendors for Customer Experience Training & Quality Analysis

Learning Management System

Create courses

from PowerPoint
Word PDF
SCORM Video
Adobe Captivate & Articulate



Mindflash is an online training platform that makes it easy to create and manage online courses. Trainers can easily add quizzes, audio, invite trainees via email, produce certificates and track results in real-time with automated tools. Mindflash has recently started supporting SCORM content from Articulate Storyline and Adobe Captivate. SCORM files will continue to have the controls they had when they were created inside Storyline and Captivate, but will also still have the player controls within Mindflash. Students may take courses via the Mindflash iPad app or on a computer and may move between the iPad and computer without losing place in the course. Mindflash allows customized URLs to customize a domain (www.training.OrlandoUtilites.com), and add branding to training and course completion certificates.

Trainees:

- “hands-on” learning with touchscreen interactivity
- View results immediately after taking a course and provide feedback to the trainer

Cost: 1) \$999/month for 1000 trainees and 50 administrators. 2) \$4,999/month billed annually for unlimited users.

System Requirements: Operating System: Mac 10.5 or higher, Windows Vista, Win7, or Win8
Internet Connection: Cable/DSL or faster; Browser: Firefox 25+, Chrome latest version, Internet Explorer 9+Safari 5+

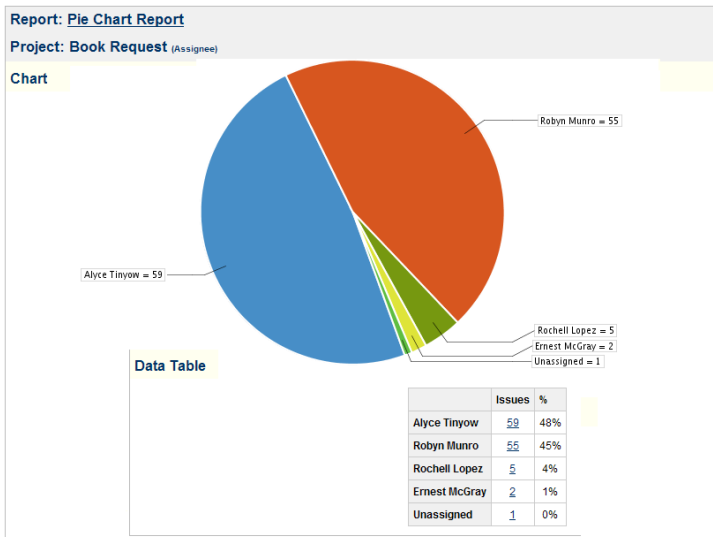
NOTE: The current OUC Client Information System (CIS) web-based application is designed for use on the following Operating Systems: Windows XP, Vista and Windows 7 therefore compatible.

Tablets: Mindflash supports use of tablets and mobile devices by Trainees using the web browser on the device. Trainees can access their account and take courses. Additionally, iPad users can download the Mindflash iPad app and access their courses that way.

Current Users: Apple, McDonald's, Johnson&Johnson, PBS, Hilton, Microsoft, Kellogg's, ebay, Four Seasons, Philips, Siemens, Oracle, Lufthansa, Wall Street Journal.

Issue and Project Tracking Application – JIRA

JIRA is not only a superior peer-review, defect tracking device but is also useful for building and resolving customer service tracking tickets. This application is available to users on the desktop or via a mobile interface. The software allows multiple users with given permissions to generate, assign, and resolve action tickets. This applies to customer service issues, software problem reporting, and training change requests. The tool's Pie Chart Report screen shows metrics for designated parameters.



Dataplane - JIRA reporting & analytics for decision makers.

Arsenale® Dataplane™ is designed for metrics-focused technical, product and project managers who require sophisticated charting and analysis of KPIs and trends in their JIRA data.

The Dataplane data engine unlocks the power of JIRA project and issue history, allowing you to reach back in time and look at historical trends, chart the timing of transitions, analyze

issue links, and evaluate project and team performance. Arsenale Dataplane is a standard JIRA-native plugin. It requires no external configuration, tools or services, and all data stays behind your firewall.

Costs:

JIRA.		Dataplane
10 users	\$10	
25 users	\$350	50 users \$250
50 users	\$700	
100 users	\$1,250	
250 users	\$2,250	
500 users	\$3,000	
2,000 users	\$4,500	

JIRA System Requirements

1. Browser

If you have disabled JavaScript in your browser or are using a script blocking tool like NoScript, you must enable your browser to execute JavaScript from JIRA to access JIRA's full functionality.

2. Java

JIRA requires a Java Developers Kit (JDK) or Java Runtime Environment (JRE) platform to be installed on your server's operating system.

If you intend to use the Windows Installer or Linux Installer to install JIRA, there is no need to install and configure a separate JDK/JRE since these executable files will install and configure their own JRE to run JIRA.

B. Requirement 1.2 - Vendor Pro et Contra

APPLICATION	Pro Positive Aspects		Cons Negative Aspects
MindFlash	Hosted on remote server		
	Administrative Reporting		Monthly service fee
	Independent of CIS operating system restrictions		Remedial training must be reassigned by instructor
	User Access Controls		
	Blended Learning		
	Coursework Grading		
	Performance Assessment		
	Self-Paced Training		
	Test Building/Scoring		
	Work On or Offline		
	Generate Reports		
	Report Management		
	Resource Management		
	On the Job Training		
	Email Integration		
	Blogs & Discussion Forum		
	Collaboration Management		
	SCORM Compliant		
	Content Management		
	Custom Branding		
	Custom Fields		
	Custom Reporting		
	Data Import/Export Features		

APPLICATION	Pro Positive Aspects	Cons Negative Aspects
JIRA	Accessible from Chrome, Internet Explorer, Firefox and Safari	Passwords must be changed frequently
	Integrates with Eclipse, IntelliJ, Visual Studio, Netbeans and JDeveloper	Proprietary plug in required
	Interactive Charts and Tables	Database compatibility not supported HSQL
	Generates information Radiator teams to track progress	Once a ticket is resolved it may have created other issues related to other tickets
	Activity Streams shows summary of recent activity in particular projects	
	Create a chart gadget from any search result or saved search filter and add it directly to your dashboard.	
	Database compatibility: MySQL, PostgreSQL, PostgreSQL, Oracle, MS SQL Server	
	Customize and save reports, slice and dice, segment report results by any combination of issue fields for drill-down analysis	
	Goal Lines and Annotations: annotate your charts with goal or performance threshold lines, burn up guidelines, and target zones using powerful new Customizer Script keywords	
	Action tickets can be linked	Action tickets cannot be viewed if the role has not been assigned to you
APPLICATION	Pro Positive Aspects	Cons Negative Aspects
Dataplane	Compatible with MySQL	Passwords must be changed frequently
	Hosts only behind the OUC firewall	Proprietary plug in required
	Internal scripting capabilities to change the colors of chart segments, rename chart axes, sort tabular data, and more	Reports that include time duration statistics—such as the Closure Time Report, Time in Status Report or the Sum Numeric Field Report—makes no consideration for non-working hours
	Download reports to pristine PDF for sharing, or export to CSV for offline analysis. You can add your own custom corporate letterhead or project logos to exports, adjust the style of the reports, and more.	Custom field may not be in the list of Dataplane's Supported JIRA Fields

C. Requirement 1.3 - Training Analysis Best Practices

The software described in this proposal may be exchanged for any similar related software. The real magic happens when the training team customizes delivery for the intended audience. This happens with a systems approach to manage complex environments over a lifecycle. The system tools used are shown in the illustrated: Analyze, Design Develop, Implement, and Evaluate (ADDIE) process in Figure 1.

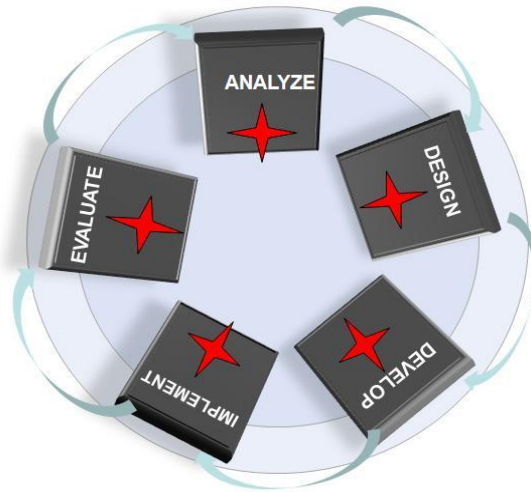


Figure 1 – ADDIE 360 Degree 365 Day Process

- A. During the Analyze phase a role-based, front end analysis is defined into a Master Task List (MTL). This list will aid in assigning courses to the intended audience once we are ready to launch training. An analysis will determine if legacy and projected training is relevant to current tasks. Figure 2 identifies the exchange of information among all users in a Siebel Customer Service environment. Showing this process model throughout training has been identified as a systems engineering Best Practice.

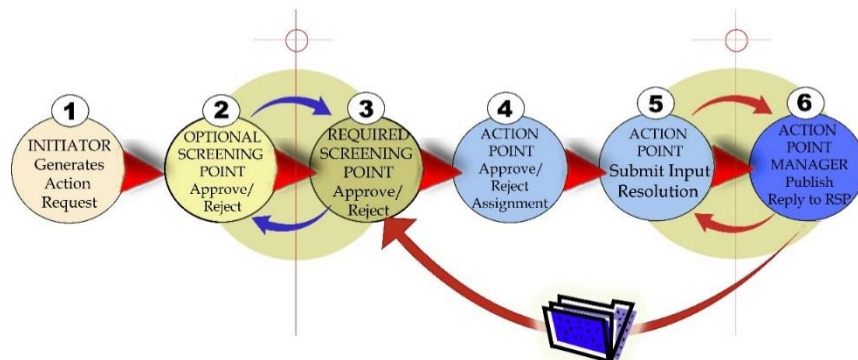


Figure 2: Users in the Siebel Customer Service Action Ticket Resolution Process

Table 1 shows a data collection form used to identify *measurable* Enabling Objectives (EO) from the Terminal Objectives (TO) established in the Master Task List.

Notice the Difficulty/Importance/Frequency (DIF) scores associated with the task. These numbers are useful to establish the method of instructional delivery and also in the Metric Reporting Analysis phase. The metrics are established by Training and the Business unit.

An example could be: If the Difficulty level is 1, easy to perform: the Importance is 2, limited critical thinking required, then this objective might be taught only in a user-guide On-The-Job aid for the Familiarization course and not required for further e-Learning development.

Project: SBS		Data Gathering Methods: Interview & Observation					
Job: SBS		Source(s) of Information: Frontline Supervisor, Senior Supervisor, Distribution Rep 4, Distribution Center Rep 4, Processor, SJTs, support documents					
Accomplishment/Duty: Processor		Date(s) Information Collected: April 8, 2005					
Tasks	Cues	Outcomes	Criteria for Success of Task	Where Task is Documented/Date	D	I	F
Prepare for Processing	Shift is beginning	Bench is prepared	<ul style="list-style-type: none"> ✓ Bench is adjusted correctly 	User Guide 12/2009	1	2	3
	Processor is returning from lunch or break	Processor is logged onto CRT	<ul style="list-style-type: none"> ✓ Supplies are replenished according to Supply List ✓ All required equipment is on ✓ Water in tape machine is more than 1/3 full ✓ Correct user ID and passwords are entered in CRT ✓ CRT is ready to scan worksheet 				

Front End Analysis Data Collection Worksheet

D. Requirement 1.4 - Define Teaching Outline & Instructional Methods

1.4.1 - Formulates teaching outlines and determine instructional methods such as individual training, group instruction, lectures, demonstrations, conferences, meetings and workshops.

1.4.2 - Develops training programs and related instructional training materials.

B. During the Design phase of the ADDIE process Adult Learning Theory is addressed. Adult learners are goal oriented yet need the ability to explore curriculum while forming associations within the system. This type of critical thinking development is applied to the Best Practice process model as shown in Figure 3.

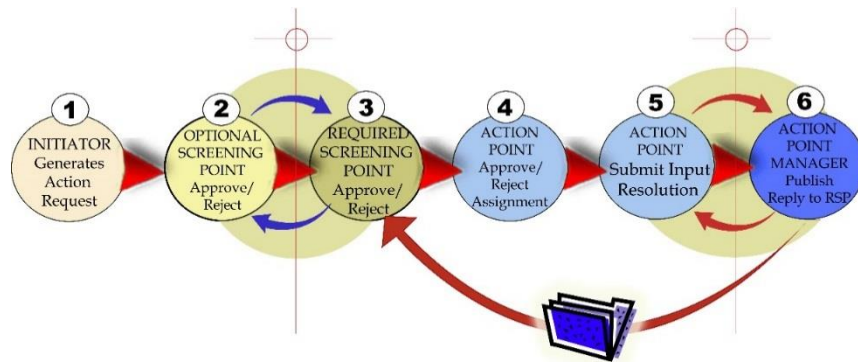


Figure 3 - Best Practice Process Model Example

C. Development and Implementation - As the front end analysis MTL comes to maturity, the DIF analysis will allow us to map out objectives required in individual training, group instruction, lectures, demonstrations, conferences, meetings and workshops.

D. Evaluations are conducted with Kirkpatrick's four steps of progressive measurement.

- Step 1: Reaction - How well did the learners like the learning process?
- Step 2: Learning - What did they learn? (the extent to which the learners gain knowledge and skills)
- Step 3: Behavior - (What changes in job performance resulted from the learning process? (capability to perform the newly learned skills while on the job)
- Step 4: Results - What are the tangible results of the learning process in terms of reduced cost, improved quality, increased production, efficiency

Training programs which build student expertise are designed in three phases:

- 1) Basic familiarization of terms and concepts. Level 1 - Just-In-Time (JIT) Users
Guide introduces system level models and describes why you would want to perform a task.
Content may be reused in live training, formatted as an Instructor Guide and/or embedded in an application as a Help File.
- 2) e-Learning Course Curriculum with pre and post tests to measure training effectiveness.
- 3) 3) Showing mastery - practical role playing exercises either in the classroom or via e-Learning.

Quality Assurance for Training Products must be peer reviewed. Beta Group test trial comments should be tracked and lessons learned should be reflected in the curriculum.. JIRA is the perfect tracking tool for this process. Defect issues are raised, managers assign these issues to a developer and once they are resolved a manager checks the work and closes out the ticket.

Small Group Test Trials should be conducted with a representative sample of the student target population to gather data on the effectiveness of instruction in regard to error rates, criterion test performance, and time to complete the course.

Customer Experience curriculum should include:

- Identify Customer journey maps
- Define fundamentals of persuasive language
- Describe customer perspective (using profiles as design tools)
 - Identify customers' needs for better design and content decisions
 - Look beyond the mechanics of usability in order to create a great experience for customers
 - Define fundamentals of persuasive design and where to apply it
 - Test your existing site, or sites in development, to identify any issues with your customer experience
 - Identify the "Total Customer Experience" - integrating across channels and beyond the limited online transaction

Practical Exercises allow students to discover the frustrations and complexities that block their way. This game is used to put the participants “in the shoes of the customer”, helping them to understand and “feel” why a focus on customer experience is critical to any business. It is often followed by a discussion or workshop to identify the pain points in the customer experience that your organization delivers, leading to action planning.

E. Requirement 1.5 - Business Use Analysis

1.5.1 - Provides quality monitoring of work produced and the review of procedures and business process improvements for Customer & Sustainable Services Department (CSS).

The following process is implemented during a 365 day fiscal year and applies to the Customer Experience training program’s marketing, implementation, and curriculum continuous improvement under the Capability Maturity Model Integration (CMMI) model. Training objectives are rated according to their assigned validity: Initial, Managed, Defined, Quantitatively Managed, Optimized. Reports generated from the JIRA/Dataplane software will provide the Major and Minor metrics to populate these measurable events for OUC Customer Experience training.

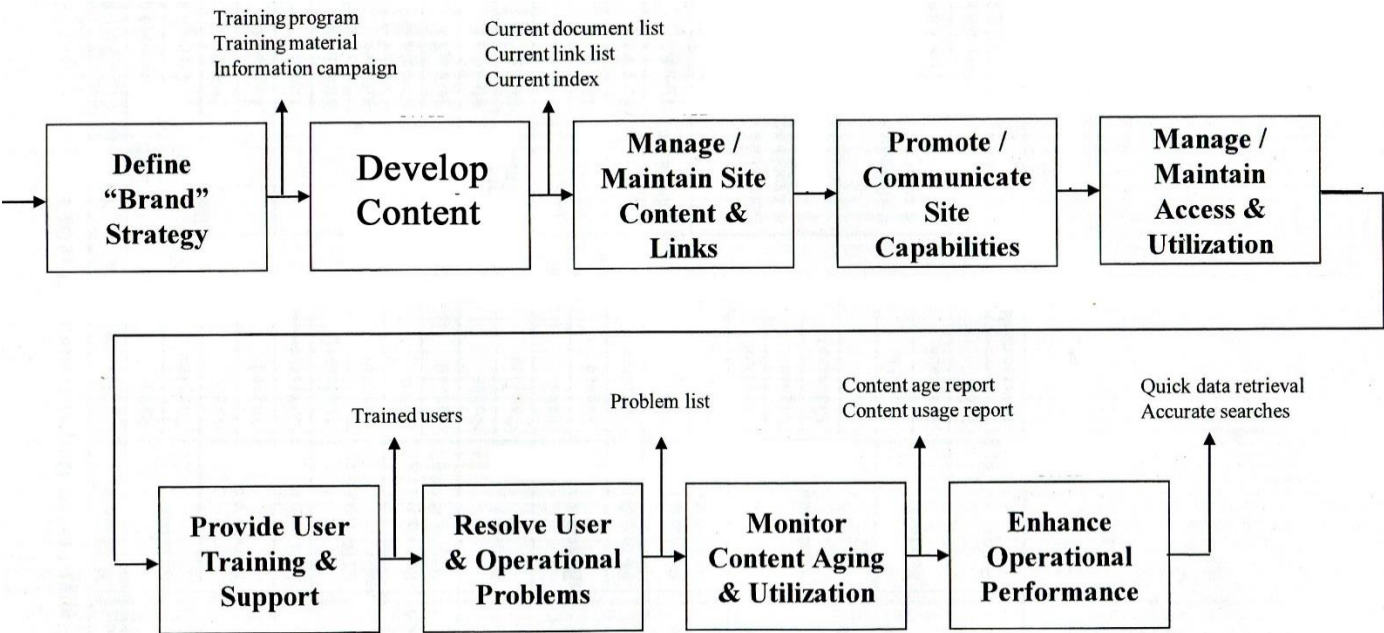


Figure 4 - Application of JIRA/Dataplane Metrics to Each Phase in the Lifecycle

F. Requirement 1.6 - Implementation Timeline

A Work Breakdown Structure is defined each fiscal year to address the time spent and scope of issues in the ADDIE process. During the annual analysis phase, training objectives are revisited to ensure they are current with job duties and OUC Best practices. This includes analyzing practical exercises taken from the live Customer Experience data pool.

A general Work breakdown Structure is shown in the following table. The actual event will depend on the fiscal budget and department requirements.

<p>First Quarter/January 01-March 31:</p> <p>Conduct Front End Analysis. As tasks are approved via the Data Collection Worksheet, begin development under the designated DIF assignment: Classroom, eLearning or Blended training.</p> <p>Implement MindFlash and Integrate with JIRA/Dataplane.</p> <p>Develop and add curriculum branding image to current legacy and new relevant training.</p> <p>Internal; Peer Review and Beta Test in small group trials before objectives are launched for OUC employees on the recorded Learning Management System. Analyze training effectiveness using Kirkpatrick's four levels of measurement.</p>
<p>Second/Third/Fourth Quarter/April 01-Dec 31</p> <p>Determine if Train the Trainer needs to be added to the scope.</p> <p>Customize reports in JIRA and Dataplane as need by the Business Unit</p> <p>Continue curriculum development and classroom and eLearning execution.</p>

G. Requirement 1.7 – Relevant Data/Measuring Performance Metrics

In project management, performance metrics are used to address the health of the project and consist of the measuring of seven criteria: safety, time, cost, resources, scope, quality, and actions.

The JIRA ticket reporting and Dataplane software will report metrics but will not address measurable risks established by the Business Unit. An important part of my Training and Quality Analysis is to work with Training Unit Managers and Business Unit Managers to identify metrics of acceptable and unacceptable threshold levels. Outcomes should support other risk management planning requirements. Possible risks include:

- Training requirement changes
- Technical deficiencies or late delivery of training products
- Delayed training completeness
- Resolving Action ticket shortfall resolutions
- Lack of resources

Ultimately, risks will impact each department's ability to execute this plan in accordance with milestones and program requirements. Likelihood and probability must be given measurable scores to determine impacts to the program budget. This includes:

1. Consequences of impact
2. Identification of a risk table to mitigate each risk

H. Key Personnel - Brenna Droege Resume

CORE QUALIFICATIONS

- Successfully define Terminal and Enabling Objectives
- Create and update Master Task List (MTL)
- Utilize automated Excel based Difficulty, Importance, Frequency (DIF) analysis to determine which objectives are taught and in which format they are delivered
- Create Instructor /Student guide templates
- Maintain Quality Assurance process

PROFESSIONAL EXPERIENCE

11/2013-10/2014 GOODHEART BIRD CENTER

Compliance Training - Instructional Designer

Working with grant writing department researching training objectives for basic familiarization, intermediate, advanced, and remedial training. This training is based on Compliance with Federal and State Fish & Wildlife Regulations and filing 3-186A reporting forms. Developed interactive lessons in PowerPoint and Captivate with mature objectives. Required understanding of adult learning theory and Blooms Taxonomy action verbs to define training objectives.

10/2012-1/2013 CAMBER CORPORATION

Instructional Design Project Manager

Assignment included developing on-line training for Navy finance following Planning, Programming, Budgeting, and Execution (PPBE). Developed Excel tracking spreadsheet to monitor Government Furnished Inventory (GFI). Designed and tracked lessons with the Novonics Easy Authoring Tool (NEAT) Learning Content Management System (LCMS), working successfully to monitor JIRA, a Customer Relationship Management peer reviews. Scheduled and tracked internal and external peer reviews.

10/2011-5/2012 L3 COMMUNICATIONS

Principal Instructional Designer

Daily activities included writing training analyses for New Equipment Training (NET) delivered with SAAB and Lockheed Martin range targets. Created a Training Task List to identify SOW required training with DID (DI ILSS- 80872) specifications for the Range Training Program Manager. Analyzed SAAB training on this Indefinite Delivery/Indefinite Quantity contract. TTL supported the Manpower Training Plan (MPTP). This MPTP was used as the foundation for cross training skill based obj

1/2006-8/2011 LOCKHEED MARTIN

Instructional Systems Engineer

Applied the Analyze, Design, Develop, Implement, and Evaluate (ADDIE) model to Joint Strike Fighter Infrastructure, aircraft maintenance and sustainment software training. I delivered this training on the Evolution Outstart LMS and also face-to-face small group sessions throughout the year.

Created easy to follow, scalable training for a large suite of eight interactive applications. Analyzed Statement of Work (SOW) to develop Integrated Master Schedule (IMS). This document was used to establish the Work Breakdown Structure (WBS). The analysis was ongoing during spiral development.

Organized training objectives into a MTL from the capabilities catalog, while ensuring key departments were satisfied at benchmark meetings. Extracted the TTL and ran a DIF analysis with the customer. Determined which training was critical and which was "On-the-Job" related. Added Blooms action verbs and numbering convention to the TTL. Created Instructor/Student Guide templates. Installed two week QA process.

Created role based step-by-step workbooks showing traceability back to original MTL for "Just in Time" training. Customer requested my User Guide to be delivered in Compressed HTML (CHM) as the software embedded help guide. Explained role and task relationships with an illustrated process model.

Wrote User Guide as the foundation for program Computer Based Training (CBT). Started the team in Adobe Captivate, capturing the live software application steps from User Guides. This is an inexpensive, application renders a SWF file. SWF is installed on every Windows operating system so it does not require additional plug-ins. The SWF files may be transferred "as is" to a Learning Management System as reusable SCORM compliant learning objects.

EDUCATION

UNIVERSITY of CENTRAL FLORIDA

Masters of Instructional Systems, December 2005

UNIVERSITY of CENTRAL FLORIDA

Bachelor of Art Degree, Specializing in Graphics & Multimedia, December 1999