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Abstract/Background

Hewitt Associates (now Aon-Hewitt) Customer Service Associates (CSA) are expected to address phone calls by members from other organizations on their benefit plans. Depending on which client those calls were coming from, the associates have to effectively navigate through their screens and complex phone systems.

In the past, there have been problems with course offerings in the training curriculum for new hires, which caused confusion and resulted in poor job performance for many of the customer service associates hired every year. Hewitt realized that insufficient training and a gap between what was learned during training and on the job function resulted in huge attrition rates of over 60%. The training was also deemed too lengthy (over three weeks long), with new hires quitting on week 2 and week 3 of training. This was proving to be costly for Hewitt Associates.

Problem at Hand

The problem with existing instructor led training materials had to do with how the old curriculum was delivered to customer service associates. The modules lacked a great deal of hands-on experience and real world scenarios to prepare them for their job on day one. This was causing a lot of confusion and frustration for new hires. The training was also deemed too long and expensive.

Solution

In order to arrive at a solution, I needed to update the curriculum so that it provides a more stable and organized curriculum that will provide the learners with a greater foundation and background of the products and systems. I decided that a blended approach would serve two purposes; i) Provide a strong foundation to the learner before the instructor led portion of the training was introduced and ii) Reduce overall training time.

I proposed an interactive branched based scenario and simulated gaming for learning. During analysis, I determined there were four areas within the existing instructor led training that could be converted to a blended solution. I designed and developed four detailed modules along with simulations using Captivate and Flash. The learning modules focused on simulating the software used by customer service associates in their daily job functions.

In one example of the blended approach, the traditional method was to teach learners how to use the complex phone system by simply addressing what each push button on the phone represented on the screen. In the blended approach, this portion of the

training was built into a simulation with several scenarios. I simulated an environment where the learner would use their mouse to move a 'hand' on screen to answer a call, and based on the conversation/scenario with the member, be able to push the right button combinations on the phone system. In 2005, the concept of 'Try-Me' type learning was not new, however rarely implemented efficiently in an online/blended module.

Next, to tie all their experience together, I also built a capstone module. In the capstone module, a real-life scenario was simulated where a caller would call in to state that they recently just gotten married and would like to add their spouse as a beneficiary to their policy (an end to end scenario). Points were assigned based on two criteria's, i) navigating through the system and ii) time. This simulation could be reused over and over again as there could be improvement in scoring and time spent on handling the call. Associates could also challenge each other to see who could score higher. All this was possible without the associates having access to the live phone and system.

Impact

To conclude, as a result of the blended approach with interactivity and simulated environments embedded into the curriculum, attrition rates fell from 60% to 35%. The online learning modules increased new hire speed to productivity by eliminating three days of training. As a result, not only did we improve training, our implementation was also recognized when Hewitt Associates received the prestigious Society for Technical Communication (STC) award. In simplistic terms, user engagement during learning was key in building a good and effective solution.