Part 1 - TRAINING NOW! Introduction

“It’s not what’s taught that matters, it’s what’s caught that matters.” Ed Schilling, UCLA Coach

We began with a big idea.

“What if the participants in a breakout session could spend their time applying the presentation’s concepts instead of just discussing them?”

And then another.

“What if they applied the concepts as if they were on a TV reality/game show like ‘Project Runway’ or ‘Chopped’ with a short time frame for the work, a single team of winners, and prizes?”

And then a third.

“Maybe we can find some SOCAP Member brands who could benefit from a powerful training activity custom-created just for them.”

So here we are.

In this program you will learn by doing.

1. Simple ways to be “Instructional Designers” who create useful training.
2. “Micro-Learning” and how to make sure your brief training sessions have long-lasting impact.
3. “Story-based Learning” to add context and make learning experiences memorable.
4. “Gamification” to engage the human desire to improve and to win.
5. Best practices for “eLearning” to create short, repeatable, self-paced training.
6. Blending these principles to a training challenge from Levi’s, Kellogg’s or Tyson.
7. Showing off your training activity to win fabulous prizes (and to help your friends from Levi’s, Kellogg’s, or Tyson, of course).
Part 2 – Terms & Definitions

A. Training. Activities and experiences that cause adults to perform a new or changed task that meets pre-determined standards. Includes something to see, hear, do, touch, taste, read, smell, & remember.

B. Instructional Design. The creation of learning experiences that practice new or changed tasks so that learners become competent and confident.

TRAINING INFO or CONTENT + REAL-WORLD ACTIVITY + REPETITION + FEEDBACK + MOTIVATION = LEARNING

[NOTE: In 2015, Instructional Designers have long since abandoned the old-fashioned idea of telling folks what they are about to learn, then showing them something, then asking learners to prove they can do what they saw. Now, we let learners explore and do. This change occurred to accommodate the adaptive learning styles of the “video-game” age (people who learn best by figuring things out and are bored by watching and waiting and listening).]

A FEW COMMON ACTIVITIES USED BY INSTRUCTIONAL DESIGNERS:

- **Role-Play.** 3 participants work together to alternate playing role of customer, agent and coach. Typically an observation form is used to help “coach” observe new standards.
- **Skill Drill.** Trainer plays role of customer so participants can demonstrate new standards over and over.
- **Brainstorm & Perform.** Participants create their own scenarios and apply new standards as the solutions. They prepare a performance for the class.
- **Mental Pictures.** Participants create illustrations to visually represent old ways Vs new ways.
- **Music and Rhythm.** Participants create a song or rhythm to present the new standards in a memorable way.
- **Selection Games.** Participants select their challenges using props (in balloons, in a bag, on a game board, on websites…) and prepare effective responses.
- **Match Games.** Participants connect problems to their solutions, or terms to their definitions, or characters to their actions...
- **Teachbacks.** Participants present new standards to each other as though they are the trainers.
- **Case Studies.** Participants analyze “wrong way situations” and prepare “right way” examples.
- **Sequencing.** Participants organize information so it represents their new standards using props (blocks, information cards, spreadsheets, word balloons…).
D. **Story-Based Learning.** Building training in context. Starting out with a real world situation or problem, then helping learners apply new skills or procedures to create the desired results.

[NOTE: The transition from task-focused learning experiences to impact-and-results focused learning experiences has shortened learning and skill adoption time dramatically, in many environments.]

**A FEW COMMON WAYS TO DESIGN A STORY**

**Colorful Character Whose Problem Must Be Solved by Learners During the Training.** “Armand Finger III loves chocolate. Every day he eats… Today, we bit down and screamed… He called you and said, “What the heck did you people do to my…”

**Dramatic Characters in Real World Situations Needing Step-by-Step Actions by Learners.** “Meet the Tornado Family. During the next 6 months, they will experience 10 major life changes. You must be prepared to help them every step of the way.”

**Place Learners in the Story.** “This could happen to you. You are in the mall, and you see a child gasping for breath. She falls onto the floor and begins to turn blue.”

E. **Microlearning.** 5-15 minute learning activity focused on one topic or skill. Often, micro-learning uses “story-based learning” principles. Learners are dropped right into a challenge and given the few (new learning) pieces of information they need to solve it.

[NOTE: Observation and coaching are essential to reinforce all learning and may be even more important for microlearning. Often, Instructional Designers create checklists or tools to help coaches observe and give targeted feedback.]

**A FEW COMMON USES FOR MICROLEARNING**

**Teach 1 small behavior or piece of information.** “We have just added Omni-Drop drying ingredients to our towelettes. Complete this activity to learn how Omni-Drop helps consumers.”

**Introduce a behavioral change and allow learners to practice “on the job”.** “When customers say ‘no’ to your first upsell attempt, use this repositioning technique to make sure they understand what they have rejected…”

**Reinforce something learned during a multi-lesson training program.** “Let’s practice listening and responding with authentic empathy.”
F. **eLearning.** Pre-programmed, interactive training that is stored and tracked using web tools such as a Learning Management System (LMS). Ideally 10-15 minutes lessons filled with meaningful visuals and activities that mirror real-world use/application of the training info or content.

*eLearning is designed frame by frame.*

The more participants are required to do, the more engaged they are. This example shares an idea for storyboard layout. Whatever your imagination can design, some programmer can make it work. [Well, almost everything in your imagination…]

<table>
<thead>
<tr>
<th>Visual On The Screen</th>
<th>Narration</th>
<th>Learner’s Activity or Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Visual On The Screen Image" /></td>
<td>1. [None.] Music playing. Birds singing. Click on “start now” to begin the training.</td>
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</tbody>
</table>

G. **Gamification.** Training activities that are presented as challenges with appropriate rewards and consequences. Often, they organized from simplest (level 1) to most challenging. The levels can be timed to add an element of urgency. Novelty, excitement, and surprise make game-based learning programs fun and memorable.

**A FEW COMMON WAYS TO TURN LEARNING INTO A GAME**

“**Figure it out**” challenge. “We’ve changed the taste of our schnoodles. Taste as many as 3 new schnoodles and select the flavor cards that best describe the new ingredients. The first person to the post the correct combination of flavor cards wins a prize. You have 5 minutes.”

“**Find the answers, then use them**” team challenge. “Using these tools [INSERT WEBSITE NAME or RESOURCE NAME] find the answers to the following questions. Then hand off your information to your teammate, who will create custom word balloons using flip chart paper and post your customer conversation. Then, hand off to teammate 3 who must use what you created to role-play the conversation on video…” Best final video wins. You have 10 minutes.
Part 3 – Training Content & Info by Brand: KELLOGG’S

**The Challenge**

- Notes about calls and emails are too brief and do not include the pertinent details.
- Busy representatives save time by typing, “Product was stale”.

### Teach Them This:

- New standards for documenting customer interactions including complaints, inquiries and compliments.
  - **✓** Who used the product?
    Examples: “Mother with 3 teenage boys.” Or “Man bought to serve during football.”

  - **✓** Detailed description of the problem including specific items in the snack mix.
    Examples (does not have to be verbatim):
    - Pretzels tasted dry and stale.
    - Everything tasted old. But the round pieces were the worst.

  - **✓** When and where it was purchased and when opened.
    Examples (does not have to be verbatim)
    - Bought at Kroger’s this morning and just opened the bag 5 minutes ago.
    - Opened today and poured in bowl an hour before trying them.

  - **✓** Lot code/use by date, if relevant.
    Examples (does not have to be verbatim)
    - Lot code indicates it should still be fresh.
    - Lot code is [type in here] which indicates fresh until [date].

- **✓** Sample complaint:
  - “Product tasted stale.”

- **✓** Sample inquiry:
  - “I can’t find Snack Mix anymore. Was it discontinued?”

- **✓** Sample compliment:
  - “I used to make my own snack mix but this is delicious and has a perfect blend.”
### Part 3 – Training Content & Info by Brand: TYSON

#### The Challenge

- Email inquiries for this new upscale audience and product do not always get a gracious enough response.
- Busy representatives miss out on the chance to connect with raving fans and to help them buy.

#### Teach Them This:

- **New standards for email response writing. (Does not have to be in this order.)**
  1. Address it to the customer’s correctly-spelled first name.
  2. Thank consumers for their business, or loyalty, or for asking a great question.
  3. Show your enthusiasm for the product by saying some about its deliciousness. Be Golden Island (do not sound like a big corporate brand with canned emails.)
  4. Find solutions so you do not have to say “no”.
  5. Give thorough answers.
  6. Invite consumers to reach out again because we are here to help.
  7. End with a gracious “thank you”.

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<thead>
<tr>
<th>Example Situations</th>
<th>Wrong Way Response</th>
<th>Right Way Response</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Email</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From: Alana Ebersole; <a href="mailto:alana@beequeen.net">alana@beequeen.net</a></td>
<td>Thank you for emailing us today. Please refrigerate the jerky after opening the package. Thank you for your email, have a good day.</td>
<td>Hello Alana, Thank you for taking the time to contact us. We love to hear that you purchased our exceptional, hand crafted Golden Island Jerky! Our delicious BBQ Korean Pork is best kept in the refrigerator after opening for up to 3 days. If you have more questions or comments, please let us know at any time. We truly value you as our customer and appreciate your loyalty. Thank you again.</td>
</tr>
<tr>
<td>From: Stu Dupp; <a href="mailto:studupp@kalapala.com">studupp@kalapala.com</a></td>
<td>Thank you for emailing us. We do not have the five spice jerky on our website. We appreciate your time, have a good day.</td>
<td>Hi Stu, We are delighted you enjoyed our exceptional, handcrafted Golden Island Five Spice Jerky while visiting California. It’s one of my favorites, too! I am sorry it is not available to purchase through our website, nor at any stores in your area, currently. However, I have notified our marketing team to let them know you were asking about the product. Meanwhile, I am happy to send you a complimentary package of Five Spice Jerky to enjoy! Please respond with your full mailing address and phone number so I may send it via US Mail. We truly value you and appreciate your loyalty. Thanks a million, I look forward to your reply.</td>
</tr>
<tr>
<td><strong>Just purchased your Korean BBQ Pork from Costco. Do I need to refrigerate the package after opening?</strong></td>
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<td>From: Chris Crydder; <a href="mailto:cc1990@comcast.com">cc1990@comcast.com</a></td>
<td>Hi Chris, Thank you for taking the time to email us at Golden Island about our Road Shows. I am delighted that you are looking for our delicious, handcrafted Jerky. You made my day! For your convenience, I am providing a calendar of our Road Shows. Please look for it at the end of this email. Also, Golden Island Jerky is available for purchase at Cost Plus World Market, and online through our website: <a href="http://www.goldenislandjerky.com/">www.goldenislandjerky.com/</a>. We currently have a special online. Buy $25 or more worth of our product and receive shipping FREE! I hope this information is helpful. Please feel free to reach out again with any questions or comments. Thank you again for your kind words and loyalty.</td>
<td></td>
</tr>
<tr>
<td>Will you have another road show event here soon? Great product--love it!</td>
<td>Hi, Please go to our website to see when the next road show is. Thanks.</td>
<td></td>
</tr>
</tbody>
</table>

| From: Sean Bean; seanbean@rean.com                                           | Hi Customer, We do not ship to Northern Ireland. I hope this helps.                                                                                                                                                 | Thank you, Sean, for telling us how much you enjoy Golden Island Jerky. I will share your feedback with our marketing and manufacturing teams and I know they will be THRILLED! I wish we were able to ship to you in Ireland. I am so sorry this is not possible right now. Will any more of your family or friends be heading to Ireland in the near future? If so, please provide a shipping address and we will send them a complimentary package they can hand deliver! You may reply to this email with shipping information. Thank you again Sean, for your kind email. |
| Do you mail overseas to Northern Ireland? If so, what would postage cost (roughly), and would I incur import tax? Have just polished off a pack of the Korean Barbecue my sister-in-law brought over from Utah. Absolutely delicious. |                                                                                                                                                                                                                   |                                                                                                                                                                                                                  |
The Challenge

- Customers call and say, **“Hey man, I’m looking for groovy pair of bell-bottom jeans like I wore back in the 70’s. Where can I still get a pair?”**
- Kind, helpful representatives refer callers to vintage stores or eBay because bell-bottoms are not in the current product line. While the consumer may find one more pair, this solution doesn’t really help us drive sales.

Teach Them This:

- New standards for recommending a current style that will feel as good, and make them as happy (maybe happier).

  ✔ **Gracious thanks for loyalty, promise to help, ask a starter question.**
  
  Example: **“Thanks so much for being a long-time customer. I’d love to help you get jeans that feel as good as your bell bottoms. We don’t have that exact style anymore but I can find you something that you’ll love for another 40 years. May I ask you a few quick questions?”**

  ✔ **Don’t assume it’s the bellbottom he loves. Ask 2-3 questions to understand what each caller likes about his old jeans (fit, fabric, nostalgia) so you can select 1 of 4 styles.**
  
  Examples (does not have to be verbatim):
  
  a) **What did you love about your old Levi’s that made you keep them for so long?** [listen for tight or loose, soft or sturdy, old memories or hates new stiff looks]
  
  b) **I know just what you mean! I have an idea for a new style that you might love just as much. Can you please tell me your waist size and height?** [write down the answer so you don’t forget]
  
  c) **Thank you.** (be sure we have the size and length before recommending the jean).

  ✔ **Recommend 1 jean because it is a lot like what he described, or because it is another classic you love. (see next page for 4 different jeans and their descriptions)**
  
  Examples (does not have to be verbatim)
  
  - I think you’ll love the [NAME OF JEAN]. It has...
Option #1: 569™ Loose Straight Jeans feel soft and broken in like your old favorites. They sit below your waist like your 1970’s jeans so the fit will be similar. They are made of 100% cotton so they will wear in with every wash. We have them in your size. Would you like me to send you a pair?

PRODUCT DESCRIPTION

Stay relaxed in our 569™ Loose Straight Jeans. Cut low at the waist with a straight leg for ultimate comfort and mobility.

Overview
- Loose fit
- Sits below waist
- Straight leg
- 100% Cotton - Imported
Option #2: **517™** Boot Cut Jeans are a classic that I love. They sit below your waist like your 1970’s jeans and have a slim leg so the fit will be similar. They’re a bootcut so they’ll fit over the same boots your bell bottoms fit over. They are made of 100% cotton so they will wear in with every wash. You’ll receive them feeling soft but looking new in a dark denim. In 40 years you’ll be calling me looking to replace them, I bet! And we’ll probably still be selling them. We have them in your size. Would you like me to send you a pair?

**PRODUCT DESCRIPTION**

Made in 1969 to fit over boots, the 517™ Boot Cut Jean has been tried and true for generations. Cut to sit below the waist, slim from hip to thigh with an authentic bootcut leg. They’re durable, comfortable, and have always looked good.

**Overview**

- Sits below waist
- Slim from hip to thigh
- Bootcut leg
- Zip fly
- 100% Cotton - Imported
Option #3: 501™ jeans are a classic that I love. They sit right at your natural waist and have a slim leg so the fit will feel similar. They are made of 100% cotton so they will wear in with every wash. In 40 years you’ll be calling me looking to replace them, I bet! And we’ll probably still be selling them. We have them in your size. Would you like me to send you a pair?

501® Original Fit Jeans

PRODUCT DESCRIPTION

An icon of American culture, the one that started it all—the 501® Original Fit Jean. A fit that's straight through the hip with our signature button-fly. Tested by generations, they continue to define the modern dress code. Great for all builds.

Overview
- Regular fit
- Sits at waist
- Straight leg
- Button-fly
- 100% Cotton - Imported
Option #4: 511™ Jeans would make you look modern just the way your bell bottoms did when you first bought them. They sit below your waist like your 1970’s jeans so that will feel the same. They are made of 100% cotton so they will wear in with every wash and be comfortable. But these jeans look modern because they have a slim leg. Based on your size and height, these will look great on you. Would you like me to send you a pair?

PRODUCT DESCRIPTION

Between a skinny and straight fit, our 511™ slim fit jeans are cut close without being too restricting. Slim throughout the thigh and leg opening for a long and lean look.

Overview
- Slim fit
- Sits below waist
- Slim leg
- Classic five-pocket styling
- 100% Cotton - Imported