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ECMC/Zenith Education Group

Community Resource Representative & WyoTech Field Representative

Role Training Curriculum

Discovery Report prepared for:
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June 2017

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Contents

Executive Summary

The admissions department of Zenith Education Group consists of three main roles: 1) the Everest Community Recruitment Representative (CRR), 2) the WyoTech Field Rep (Wyo Rep), and 3) the Admissions and Retention Advisor (ARA). These roles share similar tasks and responsibilities, with slight differences between the roles. You've asked us to focus on the CRR and Wyo Rep roles for this piece of work.

Training has existed in both formal and informal forms, consisting largely of webinars and manager support (as much as possible). Feedback from participants suggest that the webinars are anywhere from 1–4 hours over 3–4 days. Others were trained by watching recordings of webinars previously given. Some received, essentially, no formal training at all. Overall, the training experience was inconsistent.

You engaged Fredrickson Learning to lead a Discovery effort to recommend an approach to training that is both sustainable and effective. Discovery proceeded with the following considerations:

- The new program must move to a more sustainable, asynchronous-driven curriculum.
- It should balance the time needed to provide adequate training with the goal of having reps functioning in their role as soon as possible with minimal support.
- It must be flexible enough to accommodate the flow of hiring—not relying on hiring enough employees to always train in cohorts.

In the report that follows, we outline our findings and make recommendations to create a cohesive training curriculum for both the CRR and Wyo Rep roles. Broad key findings include:

- Using several different modes for learning, each with different strengths.
- Limiting instructor-led training (virtual or live) to the curriculum elements that involve broad, "soft skill" concepts that benefit from in-the-moment feedback and practice.
- Creating a "modularized" curriculum. This approach allows customization based on role while still using most of the same content. It also makes updates and additions to curriculum more realistic as the roles and organization continue to evolve.
- Prioritizing the content areas of Territory Management and Presence (the concept of being dynamic and delivering strong messages in any situation).

Discovery Overview

We began our Discovery process by meeting with Bob Burnfield and Curtis Hemmeler for Wyo Rep and Jill Cochran for CRR. At this meeting we set expectations, defined priorities, and established a working process.

Following the meeting, we began collecting content. We reviewed existing training documents for Everest and WyoTech (including the Ignite trainings) along with many of the tools required for the roles. We contacted five recently hired and trained Wyo Reps and nine recently hired and trained CRRs to seek insight into their training experience and what they felt were obstacles in preparing to fulfill their role. We sent them a short survey to collect the information and offered to talk with them over the phone as an alternative. We received responses from all surveyed—several completed the written survey and we spoke to three (one CRR and two Wyo Reps) over the phone.

We also met with Bob, Curt, and Jill several more times to clarify content, ask questions, and gauge the reaction to, and feasibility of, our recommendations.

At the time of writing, we've had a preliminary review meeting with Bob, Curt, and Jill to assure that our curriculum plan is on track. We also discussed the plan in detail with Keith and Tom who have signed off on our Discovery work and approved the development plan and budget.

Findings & Recommendations

Defining Audience Needs

One of our first discoveries in this project was that the Wyo Rep role is undergoing some strategic changes that will result in the need for an emphasis on presentation skills and the idea of having "presence" in general. We asked, "If you could have this program result in only ONE thing—no matter if it's a learning result, political result, etc.—what would it be?" Bob and Curt replied that it would be outstanding presence. They want their people to get a "wow" reaction from others when they deliver a presentation, conduct an interview, or complete a phone call.

Redefining the role also means that the Wyo Rep responsibilities will align more with the responsibilities and process of the CRRs. With this change in place, the training can focus on the similarities more so than the differences between the roles, and thus share much of the same content.

When asked the same question about the one thing she desired most as a result of the program, Jill chose understanding and building proficiency around Territory Management. Bob and Curt agreed that this was also a top priority for Wyo Reps.

Though they are very similar, it's important to note that there are still differences between the two roles. Some of the most obvious differences that impact training include:

WYOTECH FIELD REP	CRR
Exclusively in the field	Campus-based
Does in-home interviews	Does not do in-home interviews
Military is an area of focus, however community is not	Community is an area of focus
Wyo Reps have the opportunity for face-to-face training, observation, or skill practice with others in the same role during the Daytona campus visit.	CRRs do not have the opportunity for face-to-face training, observation, or skill practice with others in the same role.

Both roles are heavily responsible for building relationships and representing Zenith and their school's brands. The WyoTech and CRR leadership feel that live interactions—with trainers, coaches, and observation (both reps observing other people and other people observing them) is essential. We agree with that assessment; however, we know that several factors would need to be considered around that point, including:

- Logistics of classroom training—managing the logistics of training, whether virtual or in-person, especially if the training cannot consistently be done within/among cohorts.
- Personnel—identifying or hiring staff to train, coach, and observe, within budget and productivity requirements.
- Sustainability—determining a realistic way to support a learning model that relies on shadowing and observation.
- Performance management implications—deciding if and what from the training program will influence performance management, how to implement it, and who would need to be involved.

Both groups acknowledge that individual performance success goes beyond formal training. Training sets the expectations and provides a first exposure to the knowledge, skills, and abilities needed for the role. Currently, success is determined by in-program assessments and follow-up for three to six months on the job. On the job learning is crucial for full success in the role, which requires ongoing evaluation, coaching, and feedback. Both groups identified challenges around the frequency that each rep can be observed and given development feedback. Managers are not able to observe and provide developmental feedback as often as ideally needed and will likely not be able to truly evaluate if the content being taught has been understood and retained.

Recommendations

- Develop training modules that apply to both roles where possible. In some cases, that may mean creating one deliverable that calls out the differences between the roles within the piece itself.[1]

[1] We also analyzed the content to determine if there are topics that apply to other Zenith roles. These items have been indicated in the curriculum and we anticipate finding more efficiencies as we continue discovery for the other roles.

- Develop a modularized curriculum so that each group can choose the appropriate content and assign it in the best order for their audience. As a side note, modularization will also make it easier to update or add to the training in the future.
- Prioritize time and budget on the topics of building presence and territory management.
- Create both face-to-face and virtual versions of the live trainer component. The face-to-face version can be used for Wyo Reps when cohorts are in Daytona together, and the virtual version can be used for CRRs and as a virtual alternative for Wyo Reps if they are not able to attend the live session during the campus visit.
- Focus the time with a live trainer to topics that most benefit from the live experience, such as viewing demonstrations and receiving feedback on the subtleties of presentation skills and other skill practice.
- Limit the time spent in webinars to 1–2 hours daily, with the majority consisting of one hour. Not only will this help reps remain focused and attentive, but it also makes it more realistic for a trainer to train a group of any size, even a single individual.
- Utilize other staff as coaches. The business leaders have confirmed that providing coaches is realistic within their allotted resources. Coaches would serve as subject matter experts on the topics being discussed. They should be able to review assignments with reps, answer questions, and provide feedback. [2]
- Assume that the program will include a shadowing component. As of the writing of this document, no solution—especially for CRRs—has been confirmed, but we do have a verbal commitment to find a solution for this component.
- Consider organizational changes to address the following:
    - Decide on how to fill and formalize staffing needs:
        - Facilitator[3]

[2] At this time, coaches are not intended to evaluate the reps they coach for performance management purposes. More than one coach may be needed if it’s not possible for all coaches to be fluent in all topics required.

[3] In this instance, the title “facilitator” is used to note the difference between the skills needed in this role as opposed to the skills typically associated with a “trainer.” A facilitator is needed to help guide learners and cannot rely on a standard script from class to class.

    - Coaching
    - Shadowing
    - Observing and evaluating
  - Tie performance management and individualized development to the program through more frequent observation and evaluation.

Content Organization & Curriculum Path

Currently, there is a clear separation between what training is "supposed" to look like, and what reps get, depending on the individual. There are several reasons for this, including:

- The most recent formalized training was largely designed for a classroom setting (virtual or in-person); however, depending on when the need to hire occurs, it may be impossible to have a cohort ready.
- The realities of hiring for these positions have changed over time. In the past, it could be counted on to hire several new people in at the same time, making formalized, classroom-structured training possible. However, now there may be one to two people hired over a period of time. This change suggests that independent learning, where possible, would be most appropriate and the previous training did designed as such.
- Organizational structure changes caused challenges in securing consistent trainers.
- Licensing can take up to 12 weeks in some states, and not be necessary at all in others. This can cause training to slow down or be handled very differently, causing gaps in the flow of learning. Also of note: Reps are paid during their waiting time and there is no formal plan to fill that time with training or job-related activities.

From our analysis, we organized the content into seven essential topic groups. In addition, we found that an eighth group was necessary to provide a basic understanding of the entire program—especially to reps unfamiliar with the industry—and to ensure that the feedback portion of the program goes well. The eight essential topic groups are:

1. **Onboarding**—introduction to the larger organization and an overview of reps' specific role.
2. **Foundational**—basic information needed for the rest of the training program to work.
3. **Territory management**—topics to help reps understand lead generation, their audience(s), and how to analyze and prioritize territory.
4. **Processes**—walkthrough of key aspects of the job, such as a presentation. This topic does not discuss delivery, only the steps—what they are and the objectives behind them.
5. **General knowledge**—topics that are necessary to the job, but outside the main rep curriculum, such as compliance and technical training.

6. **"Presence" as a concept**—introduction to skills needed to convey *presence* (be dynamic and get attention) in any situation, as well as creating brand-aligned messaging.
7. **Observation**—real world understanding of their role and the schools they represent.
8. **Skill practice**—activities that move reps from understanding the processes and concept of presence to achieving proficiency.

Once we established this content organization, we took a less linear approach to learning, instead covering topic groups multiple times, in multiple ways. Learners are not always ready to absorb the entire breadth of a topic in one sitting. By covering content in a progression that builds on itself—covering basics first, then deepening the learning as they continue—we increase the chances of learning retention.

Recommendations

- Design a flexible program that can be completed either with or without a full cohort. To do this, consider the following:
  - Move content that does not require instructor-led skill practice, such as "soft skills," to learning modes that can be completed individually.
  - Order the topics so that only a few topics must be taken prior to a live experience, leaving the rest with more flexible timing. This allows reps to proceed with either the individual or live training, stagger the two, or work on them simultaneously.
  - Design live training elements to conform to a realistic training schedule that isn't too overwhelming for a single individual (in this case, five 1-hour sessions). Along with that, design the content to be largely participant discussion and skill practice, which requires less intensive preparation by the trainer.
- Organize learning by topic group and design a "mini curriculum" for each group. This better ensures that the topic is covered fully, allowing the understanding and skills for that topic group to build over the curriculum.
- Use a "Learn, Practice, Live" design approach for task/skill-based topics as much as possible. Reps first learn the concept of the skill, then practice it together with an experienced coach and, finally, practice the task/skill in a real-life setting (with the coach observing as needed).

- Design the training program to take place over approximately four weeks. This allows for many different types of learning over a reasonable time frame for the learning to sink in. Four weeks is also the average waiting time for licensing.
- Reps still waiting for their license after completing the training can use the waiting time to refresh learning, continue territory analysis, and schedule appointments for after the license is granted.
- Establish procedures and processes for reps to begin territory management and booking appointments after their training graduation and completion of licensing. This can be done during the training period and after if reps are still waiting for their licenses.

For further details on the recommended content path and curriculum design see *Proposed Curriculum* on page 17.

Learning Methods

As mentioned earlier in this report, we recommend moving as much content as possible to asynchronous learning delivery and continue to use live training for key skill practice topics. We discovered that 75% of the total learning content can become asynchronous learning.

With that much content moving to independent learning, three important questions/considerations arise:

- How do we keep the experience engaging and keep reps feeling connected to the schools while working independently?
- eLearning development can be costly. How do we train on each topic effectively while staying within budget?
- How can learners get questions answered in a timely fashion and be able to understand their learning context on-the-job as they proceed?

Recommendations

- Employ various learning methods to keep the program engaging.
- Interject independent learning with opportunities to share information and get insight and feedback from others.
- Determine methods of learning for each topic based on its strengths.

- Independent learning methods may include:
  - **eLearning**—for topics that would benefit from interactive learning or use of multiple learning techniques such as photos or video, written word, voice-over, scenarios, etc., all in one learning module.
  - **Video**—for topics that require context or modeling when live demonstration is not possible.
  - **Job aids**—for topics that can be understood through reading and/or visuals. Also for topics where having a reference sheet available while on the job would be beneficial.
  - **Guided activities**—for topics that one can learn through seeking out information or through trial and error (such as a game or puzzle).
  - **Conversations with a coach**—for topics where an experienced perspective is particularly helpful and where review or feedback is necessary.
  - **Social interaction**—for topics that benefit from shared observations and best practices, or general discussion with peers.
- Learning methods for the live training may include:
  - **Classroom training**—for nuanced topics that require skill practice and detailed review and feedback, and when travel to a central location is possible.
  - **Webinar**—for the same topics as classroom when travel is not possible. (The "live" aspect of the training can be optimized by using the webcam feature of a web-based classroom, or through video selfies taken by reps to review certain skills such as body language, etc.)
  - **Observation**—for topics where experience in context provides a deeper level of learning not possible in classroom or other independent learning.
  - **Role play**—for topics that benefit from skill practice with peers. May be done in a live classroom, in a webinar, or outside the classroom between peers or between reps and coaches.
  - **Phone call**—for individualized interactions with a trainer. May also use a web conferencing platform if needed.

For further detail on the methods recommended for each topic, see *Proposed Curriculum* on page 17.

Evaluation

As the CRR and WyoTech business leaders began to think about having a formal training program, they very quickly concluded that after completing the program, reps should have to be "certified" before they begin their role in earnest. They want to be more confident that reps completing the program retained all the information and skills they had learned and were ready to take on the role with minimal support.

"Certification" can be a problematic term when, as in this case, it's not a true professional certification. In our discussions, we've been asked to formally call this piece of the process by another name; some recommendations are given below.

When talking about other methods of evaluation that can occur throughout the program, the business leaders shared their frustration that it has been difficult to do any evaluation with the program as it stands. They are especially aware that observation—both during the program and afterward—would be a particularly effective way to evaluate knowledge and skills. However, the opportunities for managers to observe reps are not frequent enough to fully assess abilities, coach, or course correct if needed.

Recommendations

- To satisfy evaluation to Kirkpatrick Level 2, implement "Checks for Understanding" (CFU) throughout the program to assess comprehension of knowledge-based content. CFUs are taken upon completion of a topic group. Reps must pass the CFUs for all topics before they can complete the program.
- To create Level 3 evaluation structure, build opportunities for observation in to the program to evaluate skills and behavior. Observation can be done through coaching interactions, trainer interactions, and as a part of the shadowing experience.
- As a Level 2 evaluation method, create a formal final evaluation to be taken prior to completing the program. This evaluation will test all essential knowledge and skills reps need for their role, within reason. (It should be expected that they will still have some questions even after graduation.)
  - The final evaluation should include a method to evaluate knowledge retained (such as a test) and a method to evaluate skills and behavior, such as observational checklists.
  - Our recommendation is to build the final skills and behavior assessment into the shadowing process.

- Choose a name for the final evaluation other than “certification.” We have no strong recommendation on which word, but we do like the concept of “graduating” the program. “Evaluation,” “assessment,” or “course final” are options.

Continuing Education

All the CRR and WyoTech Rep leaders highly support the concept of continuous improvement. They see that learning how to do a job, and do it well, doesn’t end after the initial training period—especially in roles such as these. Continuing training was not in scope for this Discovery; however, we see an opportunity to begin creating it, at least temporarily, without adding to the current budget.

Recommendations

- Offer content from sources available to Zenith such as Lynda.com.
- Dedicate a reasonable number of hours every month/quarter/etc. for each rep to spend on continuing education, using the content mentioned above.
- Business leaders can decide if they want to select specific topics or courses that reps can take, or open the selection to anything available and let the reps decide what interests them.
- Optional: Depending on what the LMS can track of this type of learning, consider whether to establish a protocol after taking these courses, such as answering a few questions about what was learned, why they chose the course, etc., to verify that the rep has completed their continuing education learning participation. This can be created by WyoTech and CRR leaders to their preferences.
- Consider whether continuing education has any impact on performance management or measurement methodology.

Technology

As ECMC and Zenith are currently transitioning their previous LMS to Workday Learning, there were little to no existing technical specifications to consider during this Discovery. We were requested, instead, to provide recommendations for technical specs that can be used to influence how Workday Learning is configured from the start.

Please see the full list of specs in the *Appendix* on page 48.

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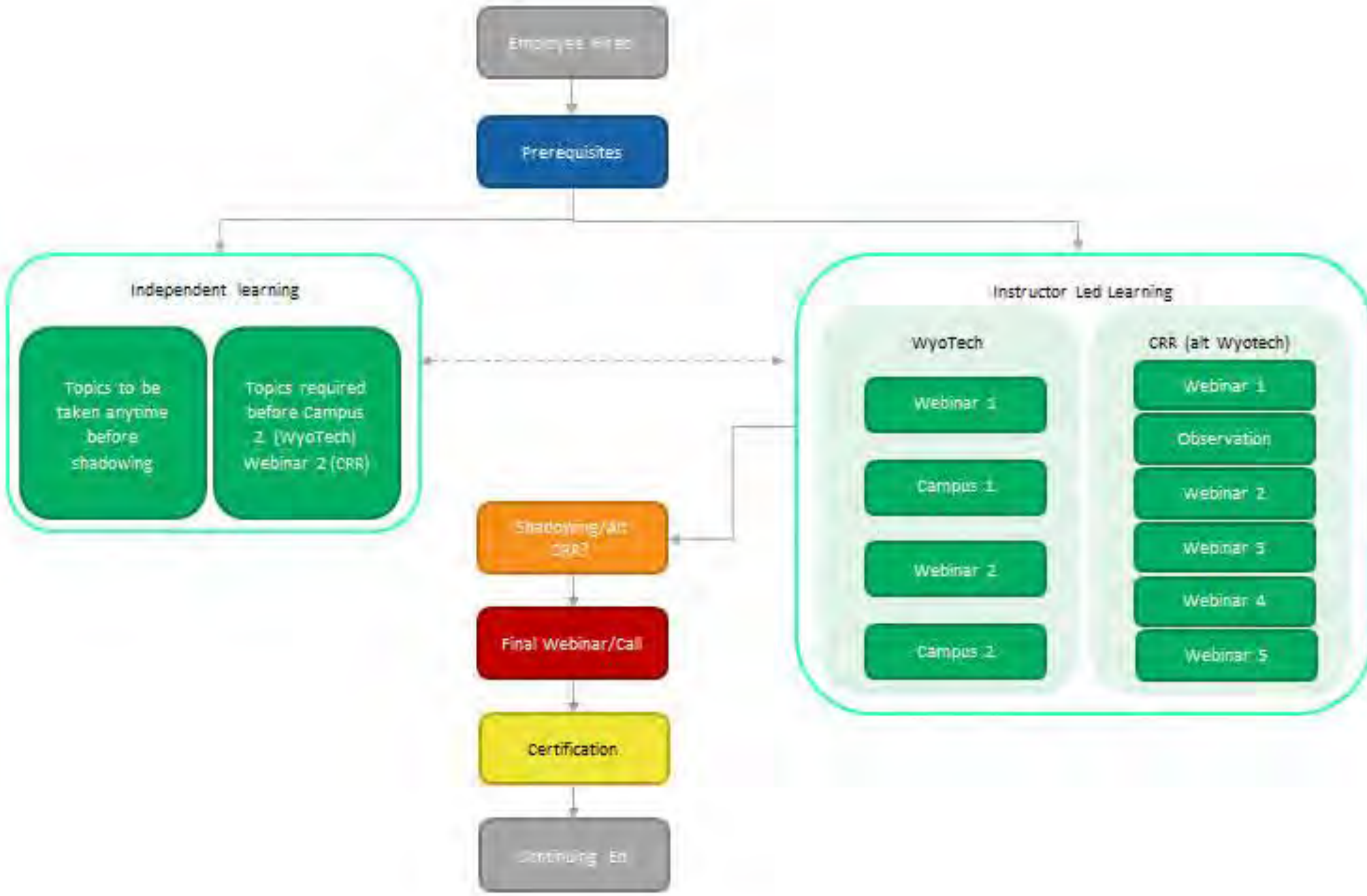
Proposed WyoTech Field Rep & CRR Curriculum



Prerequisites: General Onboarding Topic Group

Topic	Content Details
WELCOME AND ONBOARDING OVERVIEW* **Order (if required):** 1 **Group:** Both **Method:** Phone or WebEx with manager, trainer, and coach. Provide outline.	**Includes:** • Training program overview • Assigning onboarding "buddy" (another tenured rep) if applicable
ZENITH ONBOARDING* **Order (if required):** 2 **Group:** Both	**Includes:** Company basics *Being developed by another group*

ORIENTATION TO THE WYOTECH FIELD REP & CRR ROLES
 	
Order (if required): 3
 	
Group: Both
 	
Method:
• Video or non-interactive eLearning
• Manager or coach conversation
	Learning objectives:
	• Define the roles.
	• Identify the daily tasks and responsibilities.
	• Explain the goal of each role.
	• Articulate the profile(s) of the ideal WyoTech and CRR student.
	
	Includes:
	• Your role defined
	  ○ Responsibilities
	  ○ "A day in the life"— what the role looks like from day to day
	• Identifying and understanding our customers
	• Expectation of technology
	• Events
	• The importance of time management

Topic	Content Details
ADMISSIONS BASICS **Order (if required):** 4 **Group:** Both **Method:** Activity/job aid	**Learning objectives:** • Define common admissions terms • Explain the difference between non-profit and for-profit colleges **Content includes:** • Admissions terms (including acronyms) and concepts • Non-profit vs. for-profit • Licensing—what is it, why
FEEDBACK—BOTH GIVING AND RECEIVING* **Order (if required):** 5 **Group:** Both **Method:** Off the shelf content from Lynda.com or others, or the Feedback course being developed for Career Services, if applicable	**Learning objectives:** • Demonstrate the ability to give constructive feedback • Review strategies for how to accept constructive feedback

Independent Track

TOPIC GROUP: TERRITORY MANAGEMENT

<table>
<tr><th>Topic</th><th>Content Details</th></tr>
<tr><td>LEAD GENERATION

Order (if required): 1
Group: Both
Method: eLearning</td><td>Learning objectives:

Explain the goal of lead generation (qualified leads)
Explain the admissions funnel and how lead generation affects it.
Articulate the meaning of a good/qualified lead.
Identify strategies to connect with potential students
Identify strategies to book presentations with schools or community groups.
Demonstrate how to identify potential targets and lead opportunities.
Prioritize targets based on potential for qualified leads.

Content includes:

Booking presentations

Establishing rapport with the gatekeeper
Scheduling
Setting expectations for our presentation

Strategies to identify potential networking and general opportunities
Developing strategic partnerships
How to get “in”

Meet with decision makers
Community visits
Booking
Networking
Developing strategic partnerships

Consultative selling
Lead collection
AdKey explanation
Emergency lead creation tool
Referral generation
Lead submission techniques/processes
Admission funnel, noting with CRRs lead generation and WyoTech full service – how lead generation impacts admission process
Marketing resources
</td></tr>
</table>

TOPIC GROUP: TERRITORY MANAGEMENT

Topic	Content Details
UNDERSTANDING HS **Order (if required):** 2 **Group:** Both **Method:** • Activity/job aid • Coach conversation	**Learning objectives:** • Give examples of high school types, specialties, and how they're organized in the territory. • Recognize the insights provided by high school teachers that can be used as tools in your role • Explain the general profile(s) of HS potential Zenith students. • Identify common motivations and considerations for students to attend Zenith schools **Content includes:** • HS types—how they're organized (org structure) • Teacher insight • The role of HS administration • Home schools, Charter, CTC, • Acceptable High Schools • Identify differences between diploma types • Get to know competition (local and national) – create template to be completed • Recognize who is the buying committee • Discuss how to network in a HS • Refresher on Identify how Career Schools are different from traditional schools and comm. College for HS conversations

TOPIC GROUP: TERRITORY MANAGEMENT

Topic	Content Details
UNDERSTANDING MILITARY **Order (if required):** 3 **Group:** Both **Method:** • Activity/job aid • Coach conversation	**Learning objectives:** • Give examples of military types, specialties, and how they're organized in the territory. • Recognize the insights provided by military personnel that can be used as tools in your role. • Explain the general profile(s) of potential military Zenith students. • Identify common motivations and considerations for students to attend Zenith schools. **Content includes:** • Military types—how they're organized (org structure) • Personnel insight • Get to know competition (local and national) – create template to be completed • FFA, SkillsUSA, School Counselor Association • DoD MOU (Military) • Recognize who is the buying committee at a HS • Discuss how to network in a HS • Refresher on Identify how Career Schools are different from traditional schools and comm. College for HS conversations
OUR RELATIONSHIP WITH THE COMMUNITY **Order (if required):** 5 **Group:** Both **Method:** • Activity/job aid • Coach conversation	**Learning objectives:** • Explain how zip code analysis aids in lead generation. • Organize an approach to canvasing their territory based on analysis. **Content includes:** • Zip code analysis • Territory mapping—geographical and organizational analysis • Time management best practices and resources for Lynda.com or other time management resources • Development of territory plan (for military—specifics to the individual Military rep territory/market (Active duty bases, Guard and Reserve units, Veteran service organizations, national organizations))

TOPIC GROUP: TERRITORY MANAGEMENT

Topic	Content Details
TIME MANAGEMENT* **Order (if required):** 5 **Group:** Both **Method:** • Activity/job aid • Coach conversation Just one long coach conversation for all of Territory Management?	**Learning objectives:** • Identify strategies for time management • Demonstrate the ability to manage their calendar to create the correct balance of activities for the time of year **Content includes:** • Managing your calendar/navigating the week, month, and year • Summer plan
CHECK FOR UNDERSTANDING	

TOPIC GROUP: PROCESSES

Topic	Content Details
PHONE CALL WITH STUDENT **Order (if required):** N/A **Group:** Both **Method:** Activity/job aid	**Learning objectives:** • List the key components of the student phone call. • Summarize the content, messages, and questions expected in each component. **Content includes:** • Introduction • Get to Know You • Recap and Transitions • Appointment Setting • Visit Prep • Close • Review phone guide (Wyo?)

TOPIC GROUP: PROCESSES

Topic	Content Details
BOOKING & ALL COMPONENTS **Order (if required):** N/A **Group:** Both **Method:** Activity/job aid	**Learning objectives:** • List the key components to booking presentations. • Summarize the content, messages, and questions expected in each. **Content includes:** Identify strategies to book presentations with schools and/or community groups

VISIT (INTERVIEW) WITH STUDENT/ TOUR—WYOTECH
 	
Order (if required): N/A
 	
Group: WyoTech
 	
Method: Activity/job aid
	Learning objectives:
	• List the key components to the student visit/interview/tour.
	• Summarize the content, messages, and questions expected in each.
	
	Content includes:
	• Welcome
	• Student Profile/GTKY
	• Uncovering motivations
	• Your Career
	  ○ Job vs. career
	  ○ Choosing your career
	  ○ Program wheel
	  ○ Career path
	  ○ Specialty overview
	• Your Education Needs
	  ○ Why Wyotech (features and benefits)
	  ○ Student Services
	  ○ Career Services
	  ○ Housing
	• Disclosures
	• Application
	• Finance Visit
	  ○ Handoff to finance
	  ○ Estimate (done by finance)
	  ○ Handoff back to admissions
	• Understanding the in-home set-up and dynamics
	• Adobe Connect options
	• Electronic Enrollment Agreement and Disclosures

TOPIC GROUP: PROCESSES

Topic	Content Details

VISIT (INTERVIEW) WITH STUDENT/ TOUR—CRR
 	
Order (if required): N/A
 	
Group: CRR
 	
Method: Activity/job aid
	Learning objectives:
	• Recite the key components to the student visit/interview/tour.
	• Summarize the content, messages, and questions expected in each.
	
	Content includes:
	• Welcome
	• Building rapport (Everest)
	• Uncovering motivations
	• Your Career
	  ○ Job vs. career
	  ○ Choosing your career
	  ○ Program wheel
	  ○ Career path
	• Your Education Needs
	  ○ Why Everest (features and benefits)
	  ○ Career Services
	• Disclosures
	• Application
	• Finance Visit
	  ○ Handoff to finance
	  ○ Estimate (done by finance)
	  ○ Handoff back to admissions
	• Asking for the inquiry
	• Asking for the booking

PRESENTATION—WYOTECH **Order (if required):** N/A **Group:** WyoTech **Method:** Activity/job aid	**Learning objectives:** • Recite the key components to booking presentations. • Summarize the content, messages, and questions expected in each. **Content includes:** • Prep • Set-up • Presentation • Open/intro • Deliver content

TOPIC GROUP: PROCESSES

Topic	Content Details
	• Present surveys • Wrap up • Clean up • Follow up/thank you note • Skills/Delivery • Tailor presentations based on opportunity time limits (Military)
PRESENTATION—CRR **Order (if required):** N/A **Group:** CRR **Method:** Activity/job aid	**Learning objectives:** • Discuss the key components to booking presentations. • Summarize the content, messages, and questions expected in each. **Content includes:** • Prep • Set-up • Presentation • Open/intro • Deliver content • Present surveys • Wrap up • Clean up • Follow up/thank you note • Skills/Delivery • Tailor presentations based on opportunity time limits and audience
TRANSITION **Order (if required):** N/A **Group:** CRR? **Method:** Activity/job aid	**Learning objectives:** • Recite the key components of the (warm) transfer to admissions. • Summarize the content, messages, and questions expected in each. **Content includes:** • Warm transfer • Next steps

TOPIC GROUP: PROCESSES

Topic	Content Details
FOLLOW-UP/STITCH **Group:** Wyo, Both?	**Learning objectives:** • Summarize the follow up stitch meeting and its components • Explain the role of each person involved in the follow up stitch meeting **Content includes:** • Meeting with all parties—admissions, Financial Aid, Housing, Academic, etc. • Assess readiness to start
CHECK FOR UNDERSTANDING	More than one for processes?

TOPIC GROUP: CONCEPT—PRESENCE

Topic	Content Details
CONCEPT: PRESENCE—BRAND* **Order (if required):** N/A **Group:** Both **Method:** eLearning with video clips plus job aid	**Learning objectives:** • Summarize the concept of "being the brand" • Identify situations where the brand message is important in their role. • Summarize the brand accurately and effectively **Content includes:** • Define the brand/brand overview. Especially: ○ Value proposition ○ Persona (and how that relates to how you present yourself, your tone, your dress, etc.) • Sample elevator speeches • Situations where you are a brand ambassador: ○ Potential partners ○ Potential students ○ Community visits ○ Booking ○ Meet with decision makers ○ All processes ○ In person

TOPIC GROUP: CONCEPT—PRESENCE

Topic	Content Details
	○ Phone ○ Networking ○ Interview ○ Phone ○ Networking ○ Presentations ○ Tours ○ Potentially everywhere • What does the brand look like in action? • What are the expectations in regards to brand? • Concept of Consultative selling • Dress Code for reps in relation to Branding • WyoTech/Everest high-level differentiators and brand identity (who we are)
CONCEPT: PRESENCE—BEHAVIORS* **Order (if required):** N/A **Group:** Both **Method:** eLearning with video clips plus job aid Off the shelf content in addition?	**Learning objectives:** • Define the concept of "presence" • Define key characteristics of a "good presenter" • Identify skills to practice in order to grow their presence in all situations • Evaluate techniques used by others who have good presence. **Content includes:** • Presentation skills • Videos of best presenters • Listening, empathy, understanding • Being a "presence" in a room • Building Trust, Credibility & Rapport • Get their attention, Explore their needs and interests, ask questions, rev-up their commitment, User your tools, Partnership in success • Videos of best presenters • Identify the difference in presenting to adults vs HS

TOPIC GROUP: CONCEPT—PRESENCE

Topic	Content Details

CONCEPT: PRESENCE—MESSAGES*
 	
Order (if required): N/A
 	
Group: Both
 	
Method: eLearning with video and coach conversation
	Learning objectives:
	• Create an "elevator speech" that includes brand messages
	• Formulate responses to common situations in accordance with the brand.
	• Explain how to adapt messages for different audiences
	
	Content includes:
	• Elevator speech
	• Answering difficult questions
	• Relationship building
	• "Being the brand" (including what is the brand?)
	• Topics from the "Focus" model—Focus, Use acknowledgement, Empathize, Listen and Clarify
	• Script building
	• Communicating to different audiences
	  ○ HS student
	  ○ Community
	  ○ Adult
	• Script building
	  ○ Presentation
	  ○ Interview
	  ○ In person
	• The difference in presenting to adults vs HS
	• Adapting for your audience.

CHECK FOR UNDERSTANDING	

TOPIC GROUP: GENERAL KNOWLEDGE

Topic	Content Details
TECHNICAL TRAINING—SALESFORCE **Order (if required):** N/A **Group:** Both **Method:** • Job aid/activity • Off the shelf content?	**Learning objectives:** • Demonstrate the ability to enter prospect information into Salesforce • Explain how to use Salesforce to manage leads. • Demonstrate how to use Salesforce to manage leads. **Content includes:** Managing leads
TECHNICAL TRAINING—ADOBE CONNECT **Order (if required):** N/A **Group:** Wyo **Method:** • Job aid/activity • Off the shelf content?	**Learning objectives:** • Demonstrate the ability to set up an Adobe Connect meeting. • Demonstrate the ability to use successful Adobe Connect to run a meeting. • Demonstrate the ability to troubleshoot common issues with Adobe connect.
REGULATORY COMPLIANCE & MISREPRESENTATION* **Order (if required):** N/A **Group:** Both **Method:** • Job aid/activity followed by coach conversation • Reinforce within other topics	**Learning objectives:** • Summarize key compliance issues • Recognize compliance issues to situations that might occur in their role • Develop strategize to avoid compliance issues in their role **Content includes:** • Compliance Scenarios to their job • Influence on accreditation

TOPIC GROUP: GENERAL KNOWLEDGE

Topic	Content Details
PRODUCT KNOWLEDGE* **Order (if required):** N/A **Group:** CRR (and alt WyoTech) **Method:** Job aid/activity/ coach conversation	**Learning objectives:** • Describe the focus and strengths of the campus(s) they represent • List the core programs and electives offered at the campus(s) they represent • Explain the positive differentiators of the core programs at their campus **Content includes:** Product knowledge • Campuses • Campus research • Campus catalog • Core program study
CHECK FOR UNDERSTANDING	

Instructor Led/Live WyoTech—Cohort

TOPIC GROUP: WEBINAR 1

Topic	Content Details
PREP FOR CAMPUS 1* **Order (if required):** 1 **Group:** WyoTech **Method:** Webinar—assignments given to focus Campus 1	**Learning objectives:** • Identify useful situations/experiences to observe while vising Campus 1 • Articulate the behaviors and messages to observe and model from experienced staff • Recognize insights that can be gained by observing classes and speaking to students at this campus **Content includes:** • What to look for in Campus 1 • Focus the campus visit experience • Identify potential behaviors to model and words to use.

TOPIC GROUP: CAMPUS VISIT 1

Topic	Content Details

OBSERVATION
 	
Order (if required): 2
 	
Group: WyoTech
 	
Method: Campus tour, interviews, observations, & completing assignments given in webinar
	Learning objectives:
	• Observe experienced WyoTech Field Reps (or other roles with similar job components) in common situations
	• Model behaviors and messages being used successfully by others in the same role.
	• Discover insights from current students about how they came to their decision to attend WyoTech and the role the Field Rep played or could've played to help
	• Explain the school from a prospective student perspective and why the school would attract them.
	
	Content includes:
	• Observation**
	  ○ Interviews
	  ○ Classes
	  ○ Phone work
	  ○ Talk to student
	  ○ Financial aid
	  ○ Admissions (& Adobe Connect interview)
	• Campus Tour*
	• Tour Housing*
	
	**Content & logistics arranged and managed by WyoTech*
	***Logistics arranged by WyoTech*

DEPARTMENT MEETINGS **Order (if required):** 2 **Group:** WyoTech **Method:** Campus tour, interviews, observations, & completing assignments given in webinar	**Learning objective:** Summarize the function of each department and how they benefit future students **Content includes:** Meet with all departments** • Career services • Financial aid • Academics ***Logistics arranged by WyoTech*

TOPIC GROUP: CAMPUS VISIT 1

Topic	Content Details

PRODUCT KNOWLEDGE
 	
Order (if required): 2
 	
Group: WyoTech
 	
Method: Campus tour, interviews, observations, & completing assignments given in webinar
	Learning objectives:
	• Describe the focus and strengths of the campus
	• List the core and specialty programs offered at the campus
	• Explain the positive differentiators of the core and specialty programs at the campus
	• Discuss industries related to campus programs
	• Summarize the community surrounding the campus, its features, and attractions.
	
	Content includes:
	• Product knowledge
	  ○ Campuses
	  ○ Campus research
	  ○ Campus catalog
	  ○ Core program study
	• Professional Expectations of students*
	• Community orientation—What is special/attractive about area. What is it like to live in the town?*
	• Student Services, Career Services, VA Services, Housing*
	
	**Content & logistics arranged and managed by WyoTech*

IN-DEPTH ON SPECIFIC ADMIN PROCESSES
 	
Order (if required): 2
 	
Group: WyoTech
 	
Method: In-person lessons
 	
WyoTech will manage trainer and content
	Learning objectives:
	• Recite the process of interviewing
	• Summarize each component of the interview process
	• Demonstrate the ability to set up an Adobe Connect meeting
	• Explain resources available for marketing
	• Explain the expectations and processes for role specific admin tasks
	
	Content includes:
	• Admin details*
	  ○ Interviewing details
	  ○ Adobe connect
	  ○ Expense reports
	• Admin tasks*

TOPIC GROUP: CAMPUS VISIT 1

Topic	Content Details
	○ Ordering supplies ○ Setting up home office and maximizing effectiveness ○ Mobile office best practices ○ Set up of Tech resources (BYOD) ○ Travel policy and travel profile ○ HUB ○ Campus name badge • Electronic Enrollment* • Marketing/materials/attire* • Agreement and Disclosures* **Content & logistics arranged and managed by WyoTech*

TOPIC GROUP: WEBINAR 2

Topic	Content Details
PROCESS LEARNING FROM CAMPUS 1 AND PREP FOR CAMPUS 2 **Order (if required):** 3 **Group:** WyoTech **Method:** Webinar—assignments given to focus Campus 2	**Learning objectives:** • Identify useful situations/experiences to observe while visiting Campus 2 • Articulate the behaviors and messages to observe and model from experienced staff • Recognize insights that can be gained by observing classes and speaking to students at this campus **Content includes:** • Process Campus 1 • What to look for in Campus 2

TOPIC GROUP: CAMPUS VISIT 2

Topic	Content Details
PRODUCT KNOWLEDGE **Order (if required):** 4 **Group:** WyoTech **Method:** Campus tour, interviews, observations, & completing assignments given in webinar	**Learning objectives:** • Describe the focus and strengths of the campus • List the core and specialty programs offered at the campus • Explain the positive differentiators of the core and specialty programs at the campus • Discuss industries related to campus programs • Summarize the community surrounding the campus, its features, and attractions. **Content includes:** • Product knowledge ○ Campuses ○ Campus research ○ Campus catalog ○ Core program study • Professional Expectations of students* • Community orientation - What is special/attractive about area/what is it like to live in the town?* • Student Services, Career Services, VA Services, Housing* **Content & logistics arranged and managed by WyoTech*
OBSERVATION **Order (if required):** 4 **Group:** WyoTech **Method:** Campus tour, interviews, observations, & completing assignments given in webinar	**Learning objectives:** • Observe experienced WyoTech Field Reps (or other roles with similar job components) in common situations • Model behaviors and messages being used successfully by others in the same role. • Discover insights from current students about how they came to their decision to attend WyoTech and the role the Field Rep played or could've played to help • Explain the school from a prospective student perspective and why the school would attract them. **Content includes:** • Observation** ○ Interviews ○ Classes

TOPIC GROUP: CAMPUS VISIT 2

<table>
<tr><th>Topic</th><th>Content Details</th></tr>
<tr><td></td><td>Phone work
Talk to student
Financial aid
Admissions (& Adobe Connect interview)
Campus Tour*
Tour Housing*
*Content & logistics arranged and managed by WyoTech
**Logistics arranged by WyoTech</td></tr>
<tr><td>SKILL PRACTICE

Order (if required): 4

Group: WyoTech

Method: Classroom, role play, demonstration, and practice with evaluation/feedback from class and instructor</td><td>Learning objectives:
Examine behaviors and messages observed by staff in similar roles and why they work
Identify skills observed to work into their individual process
Practice “presence” behaviors in all standard processes and situations
Practice forming messages for all standard processes and situations
Practice representing the brand in all standard processes and situations
Present their elevator speech to others with presence
Demonstrate the ability to think on their feet with presence and brand messages
Practice giving the current presentation
Demonstrate the ability to deliver the current presentation with an effective, strong, presence
Differentiate strategies to connect with different potential with audiences
Adapt an elevator speech for different audiences
Content includes:
Process observations of skills and behaviors
Role play/instructor practice scenarios
Situations to practice
All processes
How to get in
Networking</td></tr>
</table>

TOPIC GROUP: CAMPUS VISIT 2

Topic	Content Details
	◦ Booking ◦ Meet with decision makers ◦ Community visits ◦ Potential students ◦ Potential partners ◦ Interview to completion of paperwork • Role Play Booking ◦ Phone ◦ Networking ◦ Presentations ◦ Tours • Consultative selling • Community organizations vs. HS counselor vs HS teacher vs HS trades class vs HS graduation coach • Connecting with students vs adults
SHADOWING PREP **Order (if required):** 5 **Group:** WyoTech **Method:** Classroom	**Learning objectives:** • Summarize the expectations of the shadowing process • Explain how Shadowing impacts final certification **Content includes:** Preparing and setting expectations for shadowing.

TOPIC GROUP: FINAL CHECK-IN

Topic	Content Details

CERTIFICATION READINESS*
 	
Order (if required): After shadowing, but before certification.
 	
Group: WyoTech
 	
Method: Call or webinar
	Learning objectives:
	• Review learning needed for certification
	• Assess the need for further review or courses to revisit
	• Apply knowledge to prepare for certification.
	
	Content includes:
	• Review concepts
	• Readiness assessment (by instructor)
	  ○ Practice tests?
	  ○ Role play?

Instructor Led/Live CRR (Alt WyoTech)—Cohort Preferred, But Not Required

TOPIC GROUP: WEBINAR 1

Topic	Content Details
PREP FOR OBSERVATION* **Order (if required):** 1 **Group:** CRR **Method:** Approx. 1 hour webinar—assignments given to focus Campus 1	**Learning objectives:** • Identify useful situations/experiences to observe • Articulate the behaviors and messages to observe and model from experienced staff • Recognize insights that can be gained by observing classes and speaking to students at this campus **Content includes:** • What to look for in observations • Focus the campus visit experience • Identify potential behaviors to model and words to use.

TOPIC GROUP: CAMPUS OBSERVATION

Topic	Content Details
OBSERVATION **Order (if required):** 2 **Group:** CRR **Method:** Campus tour, interviews, observations, & completing assignments given in webinar	**Learning objectives:** • Observe experienced CRRs (or other roles with similar job components) in common situations • Model behaviors and messages being used successfully by others in the same role. • Discover insights from current students about how they came to their decision to attend Everest and the role the CRR played or could've played to help • Explain the school from a prospective student perspective and why the school would attract them **Content includes:** Observation (video based or observe someone demonstrating similar skills, such as building a relationship and engaging in conversation with a new student). • Interviews • Classes • Phone work • Talk to student

DEPARTMENT MEETINGS
 	
Order (if required): 2
 	
Group: CRR
 	
Method: Campus tour, interviews, observations, & completing assignments given in webinar
	Learning objective: Summarize the function of each department and how it benefits future students.
	
	Content includes:
	• Meet with all departments
	  ○ Career services
	  ○ Financial aid
	  ○ Academics
	• Discover why a program would appeal to an adult or HS student
	• Explore career options for programs offered with Career Services
	• Practice describing the programs

TOPIC GROUP: WEBINAR 2

Topic	Content Details

SKILL PRACTICE—EXPECTATIONS *
 	
Order (if required): 3
 	
Group: CRR
 	
Method: Approx. 1hr webinar, role play, demonstration, and practice with evaluation/ feedback from class and instructor. Practice assignments.
	Learning objectives:
	• Examine behaviors and messages observed by staff in similar roles and why they work
	• Identify skills observed to work into their individual process
	• Practice "presence" behaviors in all standard processes and situations
	• Practice forming messages for all standard processes and situations
	
	Content includes:
	• Process observations of skills and behaviors
	• Consultative selling
	• Role play/instructor practice scenarios
	• Situations to practice
	  ○ All processes
	  ○ How to get in
	  ○ Networking
	  ○ Booking
	  ○ Meet with decision makers
	  ○ Community visits
	  ○ Potential students
	  ○ Potential partners
	  ○ Interview
	  ○ Phone
	  ○ Networking
	  ○ Presentations
	• Tours

TOPIC GROUP: WEBINAR 3

Topic	Content Details

SKILL PRACTICE—DEMONSTRATION*
 	
Order (if required): 4
 	
Group: CRR
 	
Method: Approx. 1hr Webinar, including:
• Role play,
• Demonstration
• Practice with evaluation/ feedback from class and instructor.
• Practice assignments.
 	
Give booking assignment.
	Learning objectives:
	• Demonstrate "presence" behaviors in all standard processes and situations
	• Articulate appropriate messages for all standard processes and situations
	• Model representing the brand in all standard processes and situations
	• Demonstrate the ability to think on their feet with presence and brand messages.
	
	Content includes:
	• Process observations of skills and behaviors
	• Role play/instructor practice scenarios
	• Situations to practice
	  ○ All processes
	  ○ How to get in
	  ○ Networking
	  ○ Booking
	  ○ Meet with decision makers
	  ○ Community visits
	  ○ Potential students
	  ○ Potential partners
	  ○ Interview
	  ○ Phone
	  ○ Networking
	  ○ Presentations
	  ○ Tours

SKILL PRACTICE—APPOINTMENT BOOKING **Order (if required):** ?? **Group:** CRR **Method:** Independent assignment between webinars.	**Learning objective:** Perform activities to secure bookings to occur after certification **Content includes:** Begin booking actual appointments—if approved by manager

TOPIC GROUP: WEBINAR 4

<table>
<tr><th>Topic</th><th>Content Details</th></tr>
<tr><td>SKILL PRACTICE—PROFICIENCY*

Order (if required): 5

Group: CRR

Method: Approx. 1hr Webinar, including:
• Role play,
• Demonstration
• Practice with evaluation/ feedback from class and instructor.
• Practice assignments.

Give practice assignment (recording).</td><td>Learning objectives:
• Retell the current presentation
• Practice delivering the current presentation with expected presence
• (Plus demonstrating all of the previous behavior and messaging skills).

Content includes:
• Process observations of skills and behaviors
• Role play/instructor practice scenarios
• Situations to practice
  ○ All processes
  ○ How to get in
  ○ Networking
  ○ Booking
  ○ Meet with decision makers
  ○ Community visits
  ○ Potential students
  ○ Potential partners
  ○ Interview
  ○ Phone
  ○ Networking
  ○ Presentations
  ○ Tours</td></tr>
<tr><td>SKILL PRACTICE—PRESENTATION DELIVERY*

Order (if required): 6
Group: CRR
Method: Independent assignment between webinars.

Record themselves, submit to instructor for review/feedback. Instructor assigns each a section to deliver in next webinar</td><td>Learning objectives:
• Retell the current presentation
• Practice delivering the current presentation with expected presence
• (Plus demonstrating all of the previous behavior and messaging skills)

Content includes:
• Record themselves delivering the presentation
• Submit recording to instructor for review/feedback</td></tr>
</table>

TOPIC GROUP: WEBINAR 5

Topic	Content Details
SKILL PRACTICE—PRESENTATION PROFICIENCY* **Order (if required):** 7 **Group:** CRR **Method:** 1–2 hour webinar—ability to have CRRs take turns presenting	**Learning objective:** Demonstrate the ability to deliver the current presentation with an effective, strong, presence **Content includes:** CRR presentation examples for class review/feedback (ideally to demonstrate good technique)
SHADOWING PREP* **Order (if required):** 8 **Group:** CRR **Method:** Approx. 5–10 min of webinar	**Learning objectives:** • Summarize the expectations of the shadowing process • Explain how Shadowing impacts final certification **Content includes:** Preparing and setting expectations for shadowing.

TOPIC GROUP: FINAL CHECK-IN

Topic	Content Details

CERTIFICATION READINESS*
 	
Order (if required): After shadowing, but before certification.
 	
Group: CRR
 	
Method: Call or webinar
	Learning objectives:
	• Review learning needed for certification
	• Assess the need for further review or courses to revisit
	• Apply knowledge to prepare for certification.
	
	Content includes:
	• Review concepts
	• Readiness assessment (by instructor)
	  ○ Practice tests?
	  ○ Role play?

Shadowing

TOPIC GROUP: SHADOWING PART 1

Topic	Content Details
OBSERVATION* **Order (if required):** 1 **Group:** Both **Method:** Shadowing	**Learning objectives:** • Observe experienced staff in a similar role in common situations • Model behaviors and messages being used successfully by others in the same role. • Deepen knowledge of nuances included in each tasks and component of the role. **Content includes:** • Territory management • Interview • Presentation • Phone work

TOPIC GROUP: SHADOWING PART 2

Topic	Content Details

SKILL PRACTICE*
 	
Order (if required): 2
 	
Group: Both
 	
Method: Shadowing
	Learning objectives:
	• Practice territory management in real-world situations
	• Practice interviews with real students
	• Practice the ability to effectively deliver the presentation (with support)
	• Practice adapting presentations to time limitations and audience differences (with support if needed).
	
	Content includes:
	• Territory management
	• Interview
	• Presentation
	• Co-present
	• Presentation practice
	  ○ Co-present
	  ○ Present on own
	• Present on own

TOPIC GROUP: SHADOWING PART 2

Topic	Content Details
	• Phone

TOPIC GROUP: SHADOWING PART 3

Topic	Content Details

SKILL PROFICIENCY*
 	
Order (if required): 2
 	
Group: Both
 	
Method: Shadowing
	Learning objectives:
	• Practice territory management in real-world situations
	• Practice interviews with real students
	• Practice the ability to effectively deliver the presentation (with support)
	• Practice adapting presentations to time limitations and audience differences (with support if needed).
	
	Content includes:
	• Territory management
	• Interview
	• Presentation
	• Co-present
	• Presentation practice
	    ○ Co-present
	    ○ Present on own
	• Present on own
	• Phone
	• Book appointments in new territory

Guides

Topic	Includes	Method
Coaching*	• Expectations of a coach • How to give constructive feedback	Job Aid and feedback course used in pre-requisites
Shadowing*	• For the experienced person working with the rep during the shadowing period • How they can help the rep learn through observation • Suggestions for reps to practice • How to observe and give constructive feedback • How to evaluate on proficiency (if needed)	Job Aid and feedback course used in pre-requisites
Campus tour checklists*	Guides to ensure a more consistent experience for all reps	Simple checklist with all of the places the tour guide is responsible for showing and information needing to be relayed to the rep.

**Indicates topics that can be reused fully or content repurposed for other Zenith roles.*

Appendix: ECMC eLearning Project Specification List

This document provides specifications for the eLearning courses to be developed for ECMC.

Technical Specifications

Each eLearning course should follow the technical specifications listed in this document.

1. Screen Resolution

The eLearning modules will be delivered mostly through desktop computers. The universal screen resolution for deliverables is:

960 pixels x 540 pixels (16:9)

This is a recommended resolution for 1024 x 768 (landscape) display.

2. Authoring Tool

The eLearning modules will be developed with:

Articulate Storyline 3

Storyline 3 is a rapid eLearning authoring tool. If the developer is experienced with PowerPoint, the learning curve to Storyline is minimal. Storyline is a tool that grows with a developers programming skill. Using advanced features, such as variables, conditions and triggers, allows a Storyline developer to create complicated scenarios and instructional games. Storyline can also publish the eLearning module for mobile delivery, with responsive playback interfaces.

3. Deliverable Format

The eLearning modules will be delivered in both **Flash and HTML5 formats**. The learners should be able to take the course on both desktop computers and tablets.

The training completion is tracked through the **Learning Management Systems (LMS),** Workday, to be implemented in Summer 2017. eLearning courses will be published as SCORM packages for LMS delivery. The recommended settings are:

- SCORM 1.2 Edition 3
- Completed/Incomplete
- Course completion is determined by Quiz Score/Percentage, or the number of pages visited.

Functional Specifications

Each eLearning course should follow the functional specifications listed in this document.

1. Audio

Each eLearning course contains audio narration. The objects, such as text or graphic, are synchronized with audio if needed. We would recommend using Audacity as the audio recording and editing tool. The specs for audio clips are:

- WAV format
- 44.1Khz
- Stereo
- 32 bit

2. Video

If a video clip is used in an eLearning module, we recommend using the following settings:

- Resolution: 720p
- Playback: progressive download
- Format: mp4

Please keep in mind that video files are relatively large, and usually take longer to download. We recommend reducing the duration of the video if possible. For longer video clips, we would recommend using the following methods:

- Host the video on a streaming server, such as private YouTube or BrightCove
- Embed link to the video in the course, instead of the actual video file.

If the video is developed as a stand-alone deliverable, we recommend using the following settings:

- Authoring tool: Adobe After Effects or Premiere Pro
- Host platform: Streaming Server, such as YouTube, BrightCove or internal server that allows streaming;
- Resolution: 1080p
- Playback control: provided by hosting server;
- Format: MOV or mp4
- CODEC: H.264

Closed captioning text is needed if the video needs to comply with ADA 508 or WCAG 2.0 AA accessibility requirements. Note: Storyline 3 allows adding closed captioning text to both eLearning and embedded video.

3. Navigation

- If the training needs to meet a compliance requirement, each course should use restricted navigation to make sure the learners review all content and quiz pages.
- If the learner returns to a previously visited page, the navigation restriction will be removed.
- If the training is for awareness, we recommend using open navigation.
- The following navigation buttons will be used:

Button Name	Description	Availability
Pause/Play	Stop or play audio and animation.	Always, except for quiz pages.
Back	Return to previous page.	Always, except for the first page, quiz questions, quiz results and quiz summary pages.
Next	Advance to the next page.	For restricted navigation, this button will only

Button Name	Description	Availability
		available at the end of each slide if the page was not visited previously. It will then be available after the page is visited. All Quiz pages, including quiz questions, quiz results and quiz summary pages do not have Next button. The learners use the quiz buttons, such as Submit, Retake and Continue buttons, to navigate through the quiz questions.
Exit	Exit from the course.	Always.
Audio	Adjust volume levels.	Always.
Menu	Provide links to specific topics in the training.	Always.
Resources	Provide links to external resources. The link should open a new tab to display the resources information.	Always available when needed.

4. Interactions

During the storyboarding of each course, designers should include detailed descriptions for the programming of any interactive content. These developer instructions should include any functional considerations (how it works), navigation considerations, including any additional navigation controls necessary, and any technical considerations, if they vary from the standard technical requirements defined above.

5. Standard Pages

Each course will include the following standard pages:

Page Name	Description
Navigation	• Explain what learners need to do to complete the module. • Explain restricted navigation, if needed. • Explain how the navigation buttons function.
Course completion	• Provide a button to retake quiz if learner fails. • Provide instructions on next steps of the training, if needed. • Provide instructions on how to exit from the course.

Quiz Specifications

An eLearning course may contain a series of graded quiz questions. Learners must complete each question to finish the quiz. There is no audio for question slides.

For each question:

- Allow a specified number of **attempts to get the answer correct**, based on the needs and topics of the training.
- Provide instant feedback if the leaner made an error.
- Try to stay away from True/False, Yes/No, or any other binary type of question.

Once the learner answers all questions, the completion page displays. If the leaner did not answer enough questions correctly to pass, the course should provide Retake button that allows learner retake the quiz.

If the learner answered enough questions correctly to pass, the completion page should show:

- A completion message.
- Instruction for the next step of the training.
- Instructions on how to exit from this course.

Other Design Specifications

- All colors used should meet ECMC branding requirements.
- Use appropriate branding fonts.

sage PRESENCE®

PROBLEM-SOLVING
FACILITATOR'S GUIDE

TIME BREAKDOWN

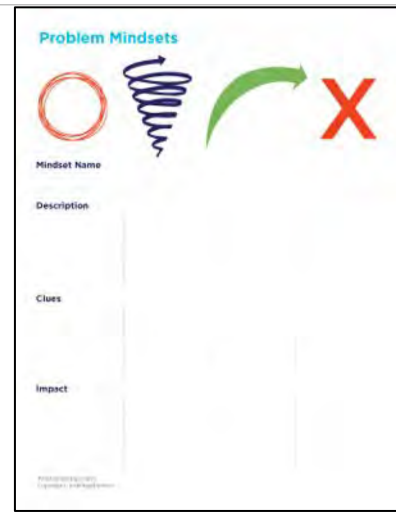
ORDER	DURATION (MINUTES)	TOPIC
0		Pre-class
1	25:00	Welcome and Overview
2	35:00	The Problem-solving Mindset
3	20:00	Working with the Mindsets
6	05:00	Break
7	10:00	Story Structure Refresh
8	01:00	Applying Story Structure to Problem-solving
9	30:00	Understanding the Problem
10	15:00	Practice—Beginning
11	15:00	Clarifying the Outcome
12	15:00	Practice—Ending
13	20:00	The Problem-solving Process
14	20:00	Practice—Middle
15	05:00	Close

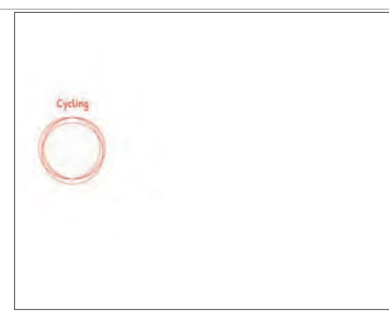
FACILITATION GUIDE

<table>
<tr><th>TOPIC/TIMING</th><th>FACILITATOR</th><th>NOTES</th></tr>
<tr><td>Pre-Class</td><td>Do:
Introduce yourself to participants as they enter the room.</td><td></td></tr>
<tr><td colspan="3">Welcome and Overview
25 min</td></tr>
<tr><td>Welcome & Introductions

10 Min</td><td>Do:
Welcome participants to the Problem-Solving course.
Introduce yourself
Have participants introduce themselves by name and role in the organization
Say:
Today we are going to revisit the story structure model you’ve already learned and take it one step further to apply it to problem-solving.

Tell:
First, lets define the word problem.
For this course, we’ll define problem as a perceived negative condition.
And a “solvable problem” as a perceived negative condition where the cause can be identified and addressed
Fairview as asked you to be a part of this course because...
We know you deal with two types of problems at Fairview:
Client problems on the phone. They tend to be solvable in one phone call.
Organizational problems. They can be more complex don’t always have easy answers.
Today we’re going to talk about how to address both types of problems, but we’ll focus our examples on the slightly more complex type of problem.</td><td></td></tr>
</table>

Challenges/Outcomes of Problem-Solving 15 Min		
	The Problem-Solving Mindset **35 min**	
Mindsets: Intro 1 Min	**Say:** Before we get into the problem-solving process we have to take a step back. **Ask:** What has to happen before you try to solve a problem (and the answer is not "there needs to be a problem")? **Desired responses:** You need to *want* to solve the problem. **Tell:** • When people see a problem, they may have an emotional reaction to it • This can impact our mindset and behaviors • This can get in the way of effectively solving the problem. **Say:** There are four different mindsets around problems and there are specific behaviors we see with each of them. **Do:** Handout worksheet 1	

Mindsets: Cycling
 	
10 Min
	Do:
	As you talk through the tell section below, begin to draw the mindset model on the board or easel pad starting with Cycling.
	
	Say:
	The first mindset we'll talk about is Cycling. It goes around and around and around complaining about the problem and never seems to go anywhere.
	
	Tell:
	• The definition of Cycling includes:
	    o Talking in circles about a problem.
	    o Accepting no possible solution or action to remedy the problem.
		

    - The negative energy just keeps going with no end in sight
    - The purpose seems to be just to complain about complaining's sake

Ask:

- How many of you have experienced someone who was cycling?
- What are the clues that someone is in this mindset?
- Other prompts include:
- What are some things they might say/do that let you know they're cycling?
- What does cycling look like?

Desired responses:

- Negative/negativity
- Defensiveness
- That can't be done
- Here's another problem
- And another thing...and another thing ...and another thing...
- Extreme and negative words like "horrible" "never" "useless" etc.
- Belief that problem is out of their control completely

Do:

- Explain that there are two common presentations of cycling
- Demonstrate the following as you describe them:
    1. The more dramatic side— "Oh my god, everything is SOOOO horrible. I can't believe it..."
    2. The "Eeyore" version which is quitter and resigned— "Oh well. Nothing gets any better. It's always a problem."

Ask:

- Is cycling a useful mindset to help solve a problem or move forward?

Desired responses:

	• No	

Mindsets: Venting
 	
8 Min
	Do:
	As you talk through the tell section below, add Venting to the model.
	
	Say:
	The next mindset is Venting. Venting can start out looking like cycling, but as it goes on it gets lighter and lighter until it disappears.
	
	Tell:
	• The definition of Venting includes:
	  o May start out sounding like cycling
	  o Loses negative energy as it goes on
	  o The purpose is to give the issue voice in order to let it go and move forward
	  o Note: often happens for problems that cannot be or are not worth being solved
	
	Ask:
	• How many of you have experienced someone who was venting?
	• What are the clues that someone is in this mindset?
	• Other prompts include:
	  o What are some things they might say/do that let you know they're venting?
	  o What does venting look like?
	
	Desired responses:
	• May sound negative at first
	• Humor
	• Rolling eyes
	• Relaxation and willingness to move on by the end
	• "I just need to vent"
	• It has an end or at least can end.
	• Clear on what they can and cannot control
	• Understanding that not all problems need, or have, solutions
		

Ask:

- Is venting a useful mindset to help solve a problem or move forward?

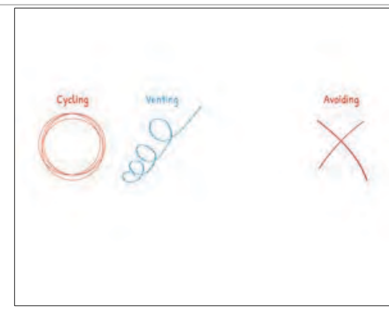
Desired responses:

- Yes and no—can be helpful in moving forward, but it certainly doesn't solve any problems.
- It can also be problematic:
  - They may be letting go of real problems that need to be solved
  - It's easy for "gossip" to be confused as venting

Mindsets: Avoiding

8 Min

Do:
As you talk through the tell section below, add Avoiding to the model.



Say:
Let's skip the next mindset and go to the other extreme—Avoiding. Avoiding is either not seeing the problem or just not wanting to deal with it.

Tell:

- The definition of Avoiding includes:
  - Not seeing the problem or seeing a problem and not wanting anything to do with it.
  - The purpose is either to avoid responsibility or they don't feel they have any power/understating of how to change anything
  - Lack of energy. Apathy.

Ask:

- How many of you have experienced someone who was avoiding?
- What are the clues that someone is in this mindset?
- Other prompts include:
  - What are some things they might say/do that let you know they're avoiding?
  - What does avoiding look like?

Desired responses:

- Shrugs
- Look distracted—like they're not listening
- Smiling and downplaying
- Ok with the status quo—"If it's not broken, don't fix it" attitude
- "I'm sure it'll get fixed."
- "Not my problem"
- "That's the way it's always been"
- "It seems fine to me"

Do:

- Explain that there are two common presentations of cycling
- Demonstrate the following as you describe them:
    1. Everything is rosy— "I'm sure someone will take care of that."
    2. Not my problem— "Not my job. Someone else can deal with it."

Ask:

- Is avoiding a useful mindset to help solve a problem or move forward?

Desired responses:

- No

Mindsets: Problem-Solving

8 Min

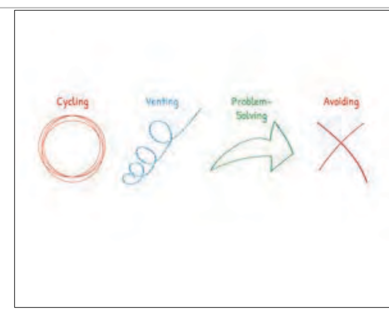
Do:
As you talk through the tell section below, add Problem-solving to the model.

Say:
The last mindset we'll talk about is Problem-solving.

Tell:

- The definition of Problem-solving includes:
    - Focused on the benefits of making change
    - Authentically wants to find a solution
    - Willing to be part of the process
    - Positive energy

Ask:



	• How many of you have experienced someone who was problem-solving?
	• What are the clues that someone is in this mindset?
	• Other prompts include:
	  ○ What are some things they might say/do that let you know they're problem-solving?
	  ○ What does problem-solving look like?
	
	Desired responses:
	• Speaks to real problems that can be fixed
	• Asks good questions
	• Provides evidence and ideas
	• "Is there anything we can do?"
	• "How can I help?"
	• "I think there's a way to make this better"
	• "Who can I talk to who can do something about this?"
	
	Say:
	This is the mindset that you need to be in to truly solve problems. It's also the mindset you want to see in others when change is necessary.	

	Working with the Mindsets **20 min**	
Working with The Mindsets—Cycling 8 Min	**Say:** Now that you have a general understanding of the mindsets, let's talk more about how they impact others and how to address each mindset as a problem-solver. **Tell:** • We're going to assume you all are in a problem-solving mindset and are willing to help others solve problems. **Ask:** • How does someone Cycling impact others? **Desired responses:** • It can suck the other into the negativity and cycling • It can be frustrating to the other	

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- It’s a distraction and takes up time for both parties

Ask:

- What should you do if you’re talking to someone and you think they are cycling?

Expected responses:

- Listen long enough and ask a few questions to determine if they are cycling
- Empathize

Do:

During the “tell” section below, write some key words or phrases on the board. Suggestions bolded.

Tell:

- Yes, **listen** a bit and **ask** a couple questions to test if they are truly cycling first.
- A key is to spend the **least amount of time** possible with someone cycling.
- That means trying to **change their mindset**, and if that doesn’t seem to be working, **leave the situation**—either literally or figuratively—without adding more fuel to the fire.
- To do this:
    - Neutrally **relay back** what they say they’re experiencing. This is not necessarily “empathizing” with them, but trying to take the emotion out of the situation. “Oh, so it sounds like you’re experiencing ___ happening.”
    - You may need to do that a few times, but keep it limited to 1-3.
    - **Ask** if they would like to try and solve the problem
    - If **yes**, proceed to helping **define** the problem.
    - If **no**, politely tell let them know that you’re happy to help them **when they’re ready** to try and address things.
    - If they say yes, but their behaviors don’t change, treat that as a no.

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<tr><td>Working with The Mindsets—Venting

6 Min</td><td>

Ask:

- How does someone Venting impact others?

Desired responses:

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	• It may point out a problem they weren't aware of and upset the other person
	• They may not be clear that you're venting
	• Can take up a lot of time and/or turn to cycling if not in check
	
	Ask:
	• What should you do if you're talking to someone and you think they are venting?
	
	Do:
	During the "desired responses" and "do" sections below, write some key words or phrases on the board. Suggestions bolded.
	
	Desired responses:
	• **Listen** long enough and **ask** a few questions to determine if they are venting (see if the negative energy seems to be going away)
	• **Ask them if they're venting**— "Do you want me to help you solve this problem? Or are you just venting to let it go?"
	• If you think what they are venting about is a problem that can be solved:
	  ○ **Educate** them on the **stakes and benefits** (which will talk about in a little bit) related to the problem for people they care about (including themselves).
	  ○ **Volunteer to help** them through the problem-solving process
	
	Do:
	Talk through any of the bullets above not brought up by the group	

Working with The Mindsets—Avoiding 6 Min	Ask: • How does someone Avoiding impact others? Desired responses: • They may avoid real problems that need to be fixed for others' benefit as well as their own Ask: • What should you do if you're talking to someone and you think they are avoiding? Do: During the "desired responses" and "do" sections below, write some key words or phrases on the board. Suggestions bolded.	

	Desired responses:
	• Similar to venting:
	  ○ **Educate** them on the **stakes and benefits** related to the problem for people they care about (including themselves).
	  ○ **Volunteer to help them** through the problem-solving process
	
	Do:
	Talk through any of the bullets above not brought up by the group	

	Break (if appropriate) **5 min**	
	Story Structure Refresh **10 min**	
Transition 1 Min	**Say:** Now that we've talked about the ideal mindset for solving problems, we're going to talk about how to use the story structure model you learned in a previous course as the foundation for an effective problem-solving process.	
Review Story Structure 9 Min		

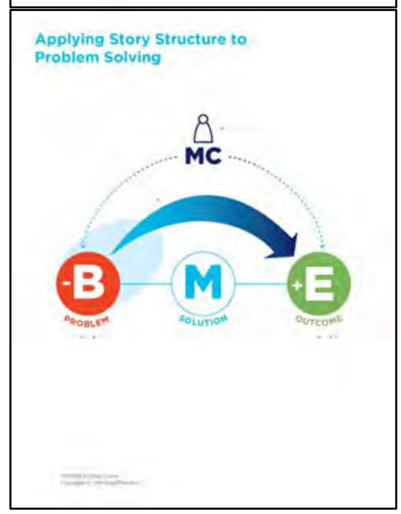
Applying Story Structure to Problem-solving
1 min

Applying Problem-Solving Intro

1 Min

Say:
One of the great things about story structure is it causes you to really focus on all the key parts of telling a good story. If you think about it, problem-solving is simply a story that hasn't been finished yet. It has the same basic elements but the action in the middle is unfolding as you go through the process.

Do:
Hand out worksheets 2 and 3



Understanding the Problem (Beginning)
30 min

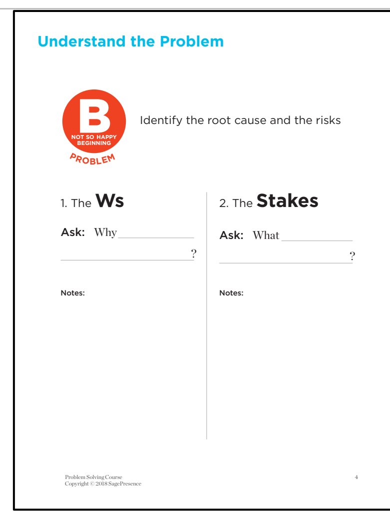
The PS Beginning—Intro

1 Min

Tell:

- In story structure, the beginning includes a situation and a feeling.
- It's similar for problem-solving.
- We need a defined situation or problem and we need to understand the impact of that problem.
- To define the problem, we start with a process we call "The Ws"
- And to understand the impact, we look at the Stakes.

Do:
Hand out worksheet 4



The PS Beginning—Root Cause 1 5 Min	**Say:** To talk this through, here's a fictitious example of a problem—"There are two people on my team that are not getting along." **Ask:** If the beginning in story structure is the "not-so-happy beginning," what's the beginning of this problem? **Expected response:** • Two people aren't getting along. **Tell:** • That was a bit of a trick question. • Sometimes what we think is the problem, is just a symptom of a problem. And sometimes it's hiding a bigger problem. **Ask:** Can we solve "two people aren't getting along?" **Desired responses:** No. Not directly **Tell:** • "Two people aren't getting along" is a statement. If "Two people aren't getting along." is the problem, the other direct solution is say "stop that." • But there's a *reason* why these people aren't getting along and if we can figure out the reason why, we have a chance at solving it. • With a general statement like "two people aren't getting along" we have dig a little more to make sure we're addressing the *right* problem. **Ask:** How many of you can think of a time where you've tried to solve a problem only to find out that you were solving the wrong problem? **Do:** • Look for nods • If it seems appropriate, ask if someone is willing to share an example. **Tell:**

- An example of this. Use this story if needed:
    - I had a client project a few years ago. After the client received the first draft of the project she complained that the quality was poor. Surprised at the feedback, I made sure to talk to the person doing the work and gave better expectations around quality. When the next draft went out the quality of the work was, in my opinion, much better, but the client still complained about the quality. Confused, we went to the next level of problem-solving and changed the person who was doing the work, but that still wasn't a fix. Finally, we sat down and asked some very detailed questions. We had been solving the problem of the quality of the work. The client's problem was *not*, in fact, the quality of the work, but instead was the quality of the proofing of the document. She would get so distracted by the typos and grammar errors that she couldn't even pay attention to the work itself. We had been solving the wrong problem! The final solution was to assure the client that everything would go through a final, professional copyedit before we completed the project. The client was able to relax knowing those things would be caught and we proceeded to our happy ending.

The PS Beginning—Root Cause 2

10 Min

Do:
Draw a tree and use it to illustrate the following tell section

Tell:

- If you think of the project in the story like a tree, the first things we were trying to solve were branches.
- If the root of the tree is sick, you can cut off every branch, one at a time, and the tree is still sick.
- The root problem for us was ______.

Say:

How do we identify the root problem? That's where the Ws come in.

Tell:

- The Ws are a series of questions that usually start with W words:
  - Who
  - What
  - When
  - Where
  - And most importantly, Why
- Sometimes all of these questions are important, and sometimes a few may be irrelevant. But *why* is *always* important.
- The first step is to ask the question **"why is this problem happening?"**

Do:
Write "Why is this problem happening?" on the board or easel.

Tell:

- You should expect to ask this question somewhere around 3-7 times.
- Sometimes you may come up with more than one problem that will need to be solved.
- You'll know when you're done because it will reach a point where there's nothing left in the response that you can solve or what's left is past history—where it doesn't matter because that step won't happen again the same way.

Say:
So, let's see how this works

Do:
Role play (when co-facilitating) the exchange below. The words do not need to be exact—make it a decent representation of what this would sound like in "real life."

Role-play:
Person 1: What's going on?

Person 2:	There are two people on my team that are not getting along.
Person 1:	Why is that happening?
Person 2:	They disagree about how to do a specific process.
Person 1:	Why is that happening?
Person 2:	Because they have different interpretations of how the process is written.
Person 1:	Why is that happening?
Person 2:	Because the process isn't written very well.

Do:
As an aside, or "thought bubble," person 1 should explain the following "tell" section.

Tell:

- Now I need to think about whether it makes sense to continue asking why.
- That last answer seems likes something we can solve, but I'm not sure if there's something else there we need to solve at the root or in addition to this.
- I'll ask one more time to test it out

Person 1:	Why is that happening?
Person 2:	I don't know. I guess the person that wrote it years ago didn't stop to think about how it could be interpreted.

Do:
As an aside, or "thought bubble," person 1 should explain the following "tell" section.

Tell:

- I can see that I can't solve anything in that last answer.
- I can't control who wrote the original process
- It doesn't matter anyway—it's in the past and this person isn't still writing processes.

Say:
So, we were able to trace that problem back in 4 whys. We now understand that the problem is not that two people aren't getting along—that's just a symptom. The

	problem is that there are multiple interpretations to a process and that's causing frustration.
	
	Tell:
	• Now ask the other key W questions to flesh out the scope of the problem
	• You may not need to ask all the other W questions
	
	Do:
	Instruct them to ask more questions (W question or worded otherwise) to better understand the scope of the problem. Use the possible answers below as a response.
	
	Expected questions/possible answers:
	• When does this happen?
	  ○ There are a few other processes like this
	• Who is having this problem?
	  ○ We all interpret the processes slightly differently
	
	Tell:
	• The who question is important because it gives us the main character of the story.
	• The main character of our problem story is the person or people impacted by the problem.
	
	Ask:
	Who is impacted by this problem?
	
	Desired answer:
	The whole team
	
	Do:
	Write the "The team" in the main character spot on the board or easel. Write the defined problem on the board as you complete the "say" section below.
	
	Say:
	So now we understand that this isn't something that's a problem just these two people are dealing with. We can define the final problem as "our team is executing a few specific processes differently because the way the processes are not well written and leave room for interpretation."	

The PS Beginning—Stakes 1	**Say:**	

5 Min	So now let's talk about the second part of our beginning. Identifying the stakes. **Tell:** • Stakes are the risk we take in doing nothing. If we don't make the change or solve the problem. • The stakes inform us about the urgency of the problem as well as help us make a business case to the other people we may need to involve in the problem-solving process. • In identifying the stakes, you ask "What is the risk if we do nothing?" • This may be obvious, or, like the Ws, you maybe need to dig into it by asking "and why is *that* a risk?" • Think of the W's as narrowing in—getting more and more specific. • Think of the stakes as broadening out—looking at the big picture impact of the problem.	
The PS Beginning—Stakes Activity 8 Min	**Do:** • Instruct the room to break into pairs • Instruct them to use the processes problem and see if they can go from the obvious stakes and broaden it out to the biggest picture possible. • Allow 3 min (or less if possible) for the pairs to discuss **Ask:** So, what are the possible risks of our processes problem? **Desired responses (in order of small to large-scale):** • These two people will keep fighting • The whole team could get frustrated • It could greatly impact morale • We'll all do the process inconsistently • We'll deliver inconsistent service to our customers • Clients can get irritated with us • We will get a bad reputation	

	• We could lose trust • We could lose business **Tell:** • Though all of those can be true, when you go to tell the problem story to others, you may lose them if the stakes seem too small or if they seem too grandiose. • Think of who your audience. Speak to the stakes that will create the most motivation. • In our example, a business leader may care about frustration in a team, but that doesn't feel urgent. • Where they are going to be most motivated, feeling urgency around the problem, is when it starts to impact the service provided. • If I sound like I'm catastrophizing by going to the extreme—our business could fail because our processes are poorly written—it will cause my audience to tune out. • One thing you might notice, the stakes have now changed something in our main character. **Ask:** Who is impacted by this problem? **Desired answer:** The whole team and our clients	
The PS Beginning—Wrap Up 1 Min	**Say:** Now you can see the full scope of this problem. We have fully identified the beginning of our story as: "Our team is not providing a consistent service experience because a few specific processes are not well written and leave room for interpretation."	
	Practice **15 min**	
Practice 15 Min	**Say:** Now it's your turn to work through an example. **Do:** • [OPTIONAL] Break into small groups of ____.	

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Explain that you will role play a person with a problem and the participants will walk through the Ws and Stakes by asking questions.
Give instructions to begin and that they will have about 10 minutes
Give a verbal indication when there is only 2 or 3 minutes left of the initial 10 minutes.

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<td colspan="3">Clarifying the Outcome (Ending)
15 min</td>
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<td>The PS Ending—Intro

5 Min</td>
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Say:
All right. It’s time to switch our focus to the happier ending.

Do:
Hand out worksheet 5

Tell:

It’s equally as important to fully identify the ending to our problem story.
The ending has also very similar to story structure with a situation and a feeling
The situation is the new situation that results from the solution and the feeling is the benefit the solution has caused.
Also like story structure, these things should be the direct opposite of the beginning situation and feeling.
Ideally, both of these can be measured—the situation may be measured with hard proof and the benefits may be measured with anecdotal evidence.

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<td>The PS Ending—Specs Activity

10 Min</td>
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Say:
So let’s go back to the problem of our poorly written processes.

Do:
Write the answers to the question below on the board in the Beginning area on the board.

Ask:
What was the root cause and the stakes of the problem?

Desired answers:
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- Processes are poorly written and open to interpretation
- Its preventing us from providing a consistent service experience

Ask:
If our problem situation is ______ then what would our results situation look like?

Desired answers:
Our processes are written clearly

Ask:
If our problem stakes are ______ then what would our benefits look like?

Desired answers:
Our team could provide a consistent service experience.

Ask:
Do you think we can measure the success of those two things? How?

Desired answers:

- Yes.
- The results can be tested to prove that it worked.
- The benefits can be seen in the team executing processes consistently

Say:
Now we can define success and complete our ending. Our ending is now "We have well written process that will allow our team to execute processes consistently and provide a quality service experience."

Practice
15 min

Practice 15 min	**Say:** Now it's your turn to work through an example. **Do:** • [OPTIONAL] Break into small groups of ____. • Explain that you will role play a person with a problem and the participants will walk through the results and benefits by asking questions.	

- Give instructions to begin and that they will have about 10 minutes
- Give a verbal indication when there is only 2 or 3 minutes left of the initial 10 minutes.

Problem-solving Process
20 min

The PS Process—Intro

3 Min

Say:
Now it's time to switch to the middle—the problem-solving process.

Do:
Hand out worksheet 6

Tell:

- You'll notice we've spent quite a bit of time on the beginning and end.
- That's because those two elements are so crucial to get right and because those are the two elements everyone should be able to do to a large degree on their own.
- And because you need to get at least this far before you get anyone else involved.
- The rest of the problem-solving process may or may not be something you can complete on your own.

Say:
Let's look at the five steps of the problem-solving process.

Tell:

- Not every problem will need all of these steps, but it's important that you intentionally decide if you need each one for *every* problem.
- The steps are:
    - Step 1—Build your team
    - Step 2—Explore
    - Step 3—Decide
    - Step 4—Implement
    - Step 5—Test and refine

- You could probably write a book about each of these steps, but we're going to go through them fairly fast and at a high level for today.

The Ps Process—Step 1

5 Min

Say:
Step one is build your team. The purpose of this step is to consider who you need to involve in order to solve the problem.

Tell:

- The first question to ask yourself is "do I need anyone's help to solve this problem?"
- Sometimes you do, and sometimes you don't.
- When it comes to problems at Fairview, we're trusting you to know those boundaries and if you're *not* clear, then its best to err on the side of at least asking your manager.
- Sometimes, even when you don't *need* someone else involved, you may find it's helpful to talk it through with someone else who's particularly good at problem-solving or asking good questions.

Ask:
How do you decide who you need to involve in solving the problem? And who might they be?

Expected answers:

- How do you decide:
    - They can help move the process forward
    - People who can actively help solve the problem
- Who:
    - The people who have decision-making power
    - The people who can implement the solution
    - They are the people impacted by the problem
    - Your manager
    - Co-workers/team

Tell:

- If you remember back to the mindsets, if you're truly in a problem-solving mindset, you're only talking about the problem to someone who can actively help you solve it.
- In an organization, in most cases, that means starting with your manager.
- To note: this step is really a transitional step between identifying the beginning and ending and starting to solve the problem.
    - The people/person you involve maybe able to add further insight to the beginning and ending based on knowledge you might not have on your own.
    - You may end up going slightly backwards before going forward again.

Say:
Once you know you need to involve other people, you need make your case and get their buy in to help you.

Tell:

- Use story structure, with one minor modification, to explain the problem and persuade them to get involved.
- Tell the story with a beginning and end, but instead of the middle, ask for their person's help in creating the middle.
- For example, we might approach a manager with our meeting problem with: "As you know, our team is consistently late to our client meetings because the schedule doesn't allow enough time to get from one building to another, which if let go might risk future business. I have some initial thoughts on solutions, but I really need your help to make it happen."

The Ps Process—Step 2

5 Min

Say:
Now that you've got the people on the team that can move the problem-solving process forward, it's time for step 2, explore.

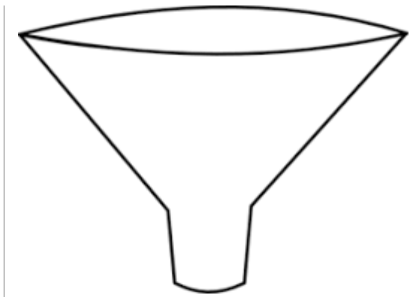
Tell:

- The purpose of the explore step is to gather all the data possible and then narrow it down to the best possible solution.

Do:
Draw a funnel on the board as you walk through the Tell section below.

Tell:

- Think of this step like a funnel.
- You put everything you can possibly collect at the top and then run it through a series of filters.
- What comes out the other end should be your solution.
- The filters are managed by identifying what you can and can change. For example, things the problem-solving effort can control might be:
    - Processes
    - Expectations
    - Communications
    - The schedule
    - Your team and yourself
    - And, though you may not be able to make the control directly, you may be able to make recommendations to others to make changes possible.
- This you can't control might include:
    - Budget
    - Systems
    - Resources
    - Politics
    - Anyone else's behavior
- As you're weighing the data, anything that would rely on something you can't control gets



	caught by that filter while the ideas you can control move further down the filter. • If you find yourself with no viable solutions at the end of the filtering process, it's very likely that you need to seek out people at the next level of decision making to continue the process.	
The Ps Process—Step 3 3 Min	**Say:** With all your data collected and filtered, you should now have one or two possible solutions to your problem. It's time to make the decision to take action **Tell:** • The purpose of the decide step make the decision to take action and solve the problem. • If you're not able to make this decision on your own, this is another place where you will need to tell the problem story to the right person/people. • Use the story structure model as you learned it this time, to tell the story (oftentimes end, beginning, middle is best for decision makers) and use the middle to explain the merits of your proposed solution. • If you are giving the decision maker a choice of solutions, tell the beginning, middle, and end of each solution • Note: keep choices to just your 2-3 highest recommended choices.	
The Ps Process—Step 4 2 Min	**Say:** With the decision made, it's time to implement the solution. **Tell:** • The purpose of the implement step is to put the solution to work • Ideally, the information you collected in explore step will inform you of how to do the implementation—whether that's following a prescribed plan or bringing in others that know how to implement these types of things.	

The Ps Process—Step 5
 	
2 Min
	Say:
	Hopefully that will be all it takes to bring about the happy ending, but many times there are tweaks that still need to be made to perfect the solution.
	
	Tell:
	• The purpose of the test and refine step is to evaluate how effective the solution is and make any final changes necessary.
	• This step is easy to overlook but can be so valuable.
	• Measure the current state by the information you collected in the beginning and ending by asking yourself and others:
	  o Did the solution address all the Ws?
	  o Did the solution minimize the stakes?
	  o Did the solution meet the definition of success?
	• Then also ask:
	  o Did the solution cause any new problems?
	  o Are there any other modifications (that are within our current ability to make) that will make this solution even better?
	• Depending on the scale of the problem, you'll want to go through these questions shortly after implementing the solution, and then again at various intervals over time.	

	Practice **20 min**	
Practice 20 Min	**Say:** Now it's your turn to work through an example. **Do:** • [OPTIONAL] Break into small groups of ____. • Explain that you will role play a person with a problem and the participants will walk through the middle, problem-solving process, focusing on the two points where you need to tell your story: o Building your team	

	○ Getting a decision made • Give instructions to begin and that they will have about 10 minutes • Give a verbal indication when there is only 2 or 3 minutes left of the initial 10 minutes.	
	Close 5 min	
Close 5 Min		