

IMPROVING CUSTOMER SATISFACTION

Instructional Design Plan

Hypothetical project, high-level design by Nicole D. Harris, NDHarris Consulting. Assisted by AI.

Project Overview

Course Title

Improving Customer Satisfaction

Course Type

Adaptive eLearning Course for Customer Service Representatives

Course Description

Improving Customer Satisfaction is a 30-minute, scenario-based eLearning experience designed for new and early-career customer service representatives. Learners strengthen communication and empathy skills that support positive customer interactions while navigating the demands of a fast-paced contact center.

This course is ideal for representatives who want to improve KPI scores, enhance professionalism on calls, and build the communication habits that support consistent KPI performance.

Estimated Seat Time

15-20 minutes

Delivery Method

Self-paced asynchronous eLearning delivered through the LMS.

Scope

Business Need

Customer service representatives must balance efficiency metrics with positive customer interactions. Low KPIs can negatively impact customer satisfaction and employee retention. Strengthening these skills early in a rep's tenure improves confidence, performance, and retention. Reps also need practice opportunities that do not require additional supervisor time.

A survey of Managers, Supervisors, and CSRs identified the following skill needs:

- Empathy
- Professional communication
- Customer personality management
- Decision-making during interactions
- Phone etiquette best practices

In Scope

- KPI awareness
- The “4 P’s of Call Handling Excellence”
- Customer personality types
- Call handling strategies for difficult interactions
- Scenario-based practice
- Performance feedback and adaptive learning pathways

Out of Scope

- Technical troubleshooting procedures
- Advanced de-escalation certification
- CRM navigation
- Live call simulations with speech recognition
- Supervisor coaching workflows

Audience Analysis

Primary Audience

Early career customer service representatives working in our contact center environment.

Learner Characteristics

Characteristic	Description
Experience Level	Beginner to intermediate
Technical Skill	Basic computer literacy
Learning Preferences	Interactive, visual, scenario-driven
Environment	Fast-paced contact center
Motivators	KPI success, customer satisfaction, performance coaching, increased earnings

Learner Challenges

- Managing emotional customer interactions
- Balancing speed with service quality
- Using empathy naturally
- Recognizing communication styles
- Maintaining professionalism under pressure

Learning Objectives

Designer note: Objectives reflect only the demonstration portion of the course.

By the end of this course, learners will be able to:

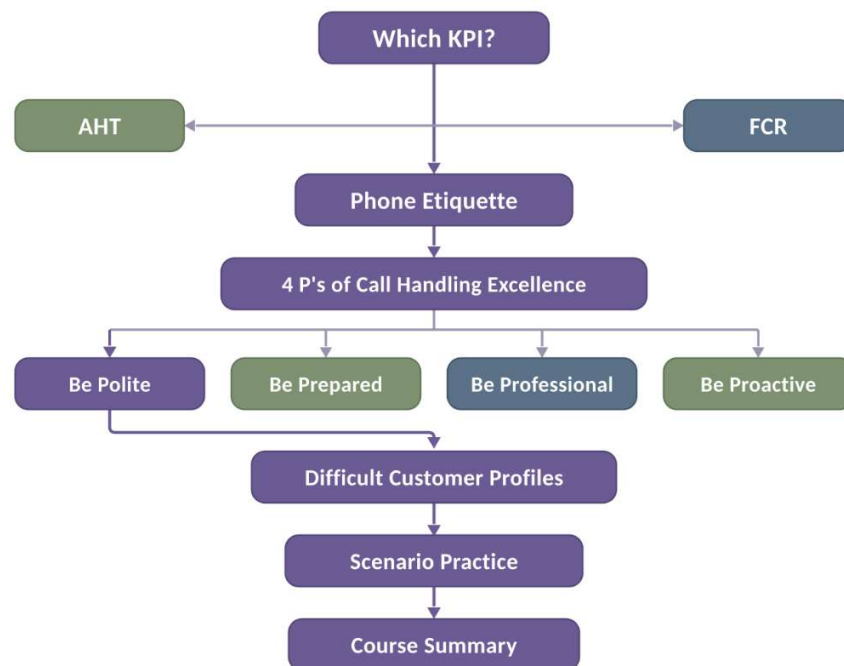
- Identify a core customer service KPI score of their own that does not meet company standards.
- Describe the four call handling excellence goals.
- Identify key characteristics of polite customer communication.
- Recognize difficult customer personality types and their communication behaviors.
- Review course concepts and identify actionable steps to strengthen future interactions.

Instructional Strategies

Strategy	Description	Reasoning
Scenario-Based Learning	Learners practice realistic interactions and make decisions in simulated call center situations.	Mirrors real interactions and supports practical skill transfer.
Adaptive Learning	Branching pathways tied to KPI areas to personalize the learner experience.	Increases relevance and focuses on improvement areas.
Guided Discovery	Learners explore customer personality types through hover interactions and layered content.	Encourages engagement and self-directed exploration.
Retrieval Practice	Multiple-choice knowledge checks reinforce empathy and communication concepts.	Supports knowledge retention and immediate application.
Coaching Feedback	Corrective and reinforcing feedback follows learner choices.	Creates a supportive learning environment and reinforces desired behaviors.

Learning Experience Flow

Designer note: The actual flow of this demonstration course is denoted below in purple along with the Lesson Plan. These are the only pathways built for the demonstration.



Lesson Plan

Objectives	Activities	Assessment	Materials/Inputs
Identify a KPI score not meeting standards	Review dashboard outside the course	Learner selects a KPI	Badges for AHT, FCR, Phone Etiquette
Describe call handling excellence goals	Interactive Branching	Knowledge Check	Icons (heart, key, book, clock), goal descriptions, supervisor image

Objectives	Activities	Assessment	Materials/Inputs
Identify politeness characteristics	Guided Content	Knowledge Check	List of characteristics, supervisor image, narration
Recognize customer personality types	Click-and-reveal	Scenario-Based practice	Avatars, persona descriptions
Respond appropriately to difficult interactions	Audio Call Simulation and Multiple Choice	Scenario-Based practice and remediation	Audio call clip, responses, coaching feedback
Review concepts and identify actionable steps	Course summary.	Internal performance metrics (over six months)	Audio narration, Supervisor image

Audio Strategy

- Narration for key instructional screens
- Conversational tone
- Moderate pacing
- Closed captions enabled

Accessibility Strategy

- Keyboard navigation
- Screen reader-friendly labels
- Color contrast compliance
- Captioned audio
- Reduced text density
- Clear focus states

Preliminary Evaluation Strategy

- **Formative Assessment:** Scenario-based multiple-choice interactions
- **Summative Assessment:** Scenario-based branching assessments

Metrics

- Completion rates
- Knowledge Check scores (Try Again)
- Branching Assessment scores
- Learner satisfaction surveys
- KPI performance trends including Sales Revenue, Sales Conversion, AHT, FCR, Phone Etiquette
- Supervisor observations
- Customer satisfaction metrics (CSAT)

- Employee Turnover
- New Hire Orientation Scores

Development

Development Team

Role	Person	Notes/Tasks
Instructional Designer/eLearning Developer/PM	Nicole D. Harris	Leveraging AI tools for rapid development.
SME/Reviewer	Supervisors/team leads from each region	Determined by Workforce Management
Graphic Designer	AI Authoring Tools	
LMS Administrator	Operations LMS Admin	Launch, enrollment, metrics
Workforce Management	Analyst	Assignments, scheduling, SME/pilot groups
Performance Management	Analyst	Evaluation data, reporting
Change Management	Analyst	Communications

Development Milestones

The duration of the milestones depends upon the collaboration of the SMEs, availability, and knowledge.

Milestone	Deliverable	Estimated Duration
Analysis	Needs analysis and audience review	2 to 3 days
Design	Instructional Design Plan Visual Concept & Prototype Storyboard & Script	14 days
Development	Storyline build and interaction design Graphics, audio, and assets	1 to 2 weeks
QA Testing	Functional and accessibility testing	3 days
Stakeholder Review	SME and stakeholder revisions	3 to 5 days
Final Publishing	SCORM packaging and LMS upload	1 day

Tools & Technologies

Tool	Purpose
Articulate Storyline 360	eLearning development Text-to-speech
Microsoft PowerPoint	Storyboarding and graphics
Microsoft Designer	Visual asset creation
Audacity	Audio editing
LMS Platform	Course deployment and tracking

Preliminary Learning Delivery Plan

Deliverables

- SCORM-based eLearning course
- Supervisor/manager communication summarizing the course content, plan context, and coaching expectations.

Launch Plan

This self-paced course will be hosted on the company LMS as SCORM-compliant eLearning. Learners will be able to access the course from their desktops or laptops.

Phase	Activity	Audience
Pilot	Small learner group testing and feedback using the LMS Virtual Meeting for feedback.	Small group (approximately 20) of supervisors and learners, one in each region, not including SME's
Final Revisions	Apply feedback and assessment from evaluation metrics.	Instructional Designer/Developer
Launch	Communications LMS course assignment	LMS Administrator All Supervisors and Managers Workforce Management
Evaluation	Communicate evaluation data weekly 30-day supervisor surveys	Leadership Supervisors and Managers LMS Administrator Performance Management

Enrollment Plan

CSRs will be automatically assigned to the course when one or more of their KPI scores — AHT, FCR, or Phone Etiquette — fall below minimum expectations, or when a supervisor determines the course is warranted. This process will require collaboration between Performance Management and the LMS Administrator.