December 4, 2020

Andy Carter
Director of Annual Giving
Mercer University

Dear Director Carter,

We are pleased to tell you that we have concluded our research and analysis of the Mercer Phonathon training. The following report will include the details of our findings and the subsequent recommendations we have for improving future training sessions.

You told us that you believed that the Phonathon training was lacking in that it was not helping students to bring in more donations and that students were not confident in their ability to handle phone calls with potential donors on their own. The work we have done for this project will highlight some ways that we can solve these problems.

Our biggest takeaway from our research was that the training that is already in place covers all the material needed, but not in a way that aided students in remembering it on the job. Primarily, we were concerned with the presentation of the information. We believe that with the right instructional materials, you can structure the course in a way that engages students, keeps them engaged, and helps them to retain the information. In addition to the software and call procedure training, we have also included in this report recommendations for latecomer training since doing the same 3-day training course for individuals would not be practical.

In this report, you will find the details of our findings, our recommendations based on those findings, and examples for what you might find useful in improving and implementing the Phonathon training. With the recommended changes, we believe that Phonathon will bring in more donations for years to come.

We would like to thank you for the opportunity to work on this project, and we encourage you to contact us if you have any questions.

Best,

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Phonathon Training Report

Prepared for

Director Andy Carter, Director of Annual Giving

Mercer University

December 4, 2020

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Background and Purpose

The Mercer Phonathon is an important source of funding for Mercer University. Every year, Phonathon employs student callers to reach out to alumni, parents, and friends to update biographical information, share campus updates, build relationships, and ask for financial donations that go towards scholarships, learning experiences, athletics, faculty development, and more. Phonathon focuses on donors who give between $25 and $1,000, with the majority of donors giving $250 or less. This segment of donors comprises a significant portion of Mercer's overall donor count.

Andy Carter, the Director of Phonathon, reached out to us to develop training for the student employees. Director Carter feels that donations, specifically credit card donations, are not where they should be and is hoping to fix this. After an analysis of the situation, we feel that training will be beneficial to Mercer Phonathon. Out training will address the differences between the current and desired state of Phonathon and strive to close that gap.

This document will further discuss our analysis of Phonathon and our training recommendations.

Needs Assessment

The Phonathon training program strives to teach new and returning Mercer students how to use the RNL Engage software to make calls, take donations, and log the outcomes of each call. The training also focuses on call procedure and how to talk to potential donors. Director Andy Carter has asked us to assess the current state of the training and make suggestions for changes to the program to make it more efficient.

There are no major events that have led to a need for training, but Director Carter's desire for training stems from his want to increase Mercer Phonathon donations.

Desired State of Phonathon

By the end of this training, student employees...

- will efficiently and effectively navigate the RNL Engage interface.
- will know how to log a variety of different calls properly.
- will be knowledgeable of donee departments at Mercer.
- will know how to be personable when talking to potential donors.

As a result, Mercer Phonathon will bring in more donations.

Current State of Phonathon

Currently, student employees…

- know the RNL Engage interface but are not confident with it.
- know how to log some of the calls but are confused by others.
- are not motivated to be engaging when talking to potential donors.
- are less than satisfactory at receiving donations.

Gaps between the States

There is a knowledge gap between the current and desired state. We want to bridge the gap between what the student workers already know and what Director Carter wants them to know. As stated earlier, the workers do not know the information needed to perform certain tasks and are not confident.

There is also an attitude gap. Students are not currently motivated to work to the best of their ability, and many do not take this job as seriously as they should. This unmotivated attitude leads to student workers knowing the basic information but lacking drive to use that knowledge productively.

Lastly, we have found a skill gap. While these students do possess communication skills, they are not entirely on par with the desired state. The skill gap between the current and desired state is small, but we feel that by completely closing this gap, Phonathon will be more successful. Training will ensure that the learners have the necessary resources, skills, knowledge, and attitude needed to have a high-performance level.

Proposal

We plan on developing handouts that will effectively display vital information to the student workers. We will also develop a video to be played during training sessions; this video will serve as a crash course. Additionally, we will update the RNL Engage interface, so it is easier to navigate. All in all, the more students possess the necessary knowledge and insight to perform their jobs, the more donations will be made.

Learner Analysis

The learners in the Phonathon training program are all Mercer students who have little to no experience with Phonathon. Training will help these students gain the confidence and skills needed to be successful Phonathon callers. To find out more about these students and how we can adapt the training to suit them, we conducted a learner analysis. The learner analysis looks at who the learners are, what their backgrounds are, and what their motivations are for attending the training. The purpose of this analysis is to determine what kind of training would be appropriate for this group of learners. To conduct this research, we attended a Phonathon session and talked with the students themselves.

Demographics

In years past, the majority of students participating in Phonathon were college freshmen. However, this year we observed that there was an even mix of college classification levels in the group of about 20 students. Director Andy Carter employs students from a variety of backgrounds and ethnic groups. This group has a strong female majority, with only two out of the 20 students being male.

Educational Background

The learners are all college students. Most learners are relatively new to college (freshmen or sophomores), but around 5 in 20 are returning Phonathon callers. The learners come from various schools of focus (business, nursing, engineering, etc.) at Mercer.

Work Experience

The learners are mostly new callers, with only around 5 in 20 being returning employees. Work experience varies widely, though those with work experience will likely only have worked in entry-level positions.

Skills/Desired Characteristics

Director Carter is looking to hire students who are energetic, excited about Mercer, and good conversationalists. He values workers that have customer service experience. Superior communication skills are essential and a key characteristics Director Carter is looking for when hiring. All students who are hired will be required to attend the training.

Motivations for Attending Course

Training is mandatory and paid. Students work Phonathon to gain interpersonal and professional work experience. Students also work Phonathon to make some extra cash from an easy and convenient on-campus job.

Impact

Since many of the workers have little to no call experience, and because of the variety in backgrounds, we have to ensure that we thoroughly cover the basics of both the software and procedures used. We will need to cover all fundamental information relating to RNL Engage software as well as appropriate call procedures in order to ensure success across the board. For this group of learners, we believe that training will prove beneficial by increasing knowledge, expanding skills, and changing certain attitudes. Our training will thoroughly cover RNL Engage and calling procedures so students will be more confident and knowledgeable when logging and making calls. These students likely already possess satisfactory communication skills; however, through training, they will build upon these skills to better communicate with potential donors. Our training will emphasize the importance of the donations and explain how these donations will affect the learners and their peers. We feel that this will change the students' attitudes leading them to take the job more seriously and encouraging them to be more motivated to learn while in training.   With the implementation of our training, we foresee learners gaining the knowledge and skills needed to increase the number of Phonathon donations.

Context Analysis

This context analysis looks at three different context areas: orienting, instructional, and transfer. The orienting context analyzes why the learners come to the training, the learners' perceived relevance for instruction, and the motivation the learners have for attending the training. The instructional context analyzes the physical environment, resources, and equipment with which the training is given. Finally, the transfer context explores how the learners will use their training in the workplace.

Director Andy Carter is concerned that the current Phonathon training does not bring in enough donations (or "gifts") and thinks that better training might help. Without proper training, Phonathon is losing out on potential donations from prospects. With training, we intend to increase donation pledges and donations made through credit cards.

Orienting Context

The reason students attend the training sessions is that it is a requirement. The students also want to gain the skills and knowledge that will be needed later on the job. Furthermore, the training is relevant to the students because it will provide hands-on experience. Students do not want to fail at doing their job; therefore, it is necessary to attend training. Additionally, the students are motivated to participate in the training sessions because they ultimately want to stay employed. Not attending the training session will most likely lead to immediate termination.

Instructional Context

The training will occur in Engineering Room 111A with a live trainer one week before the student workers begin making calls to potential donors. The students will be in a small computer lab where they will be given a computer station to work at and a headset to work with. The computer lab has around 10 computers and 15 seats. During the training, students will have access to the RNL Engage interface, and the instructor will be able to show their own computer screen via a projector. This allows students to gain experience using the same program they will use during actual Phonathon calls.

Transfer Context

The student workers will be training in the same room that they will be working in. The training also has the same computers and phones that will be used on the job. Further, the same handouts, bulletin board, and other resources will be available to the workers in both the training and on the job. Phonathon training involves a lot of hands-on learning. In this way, the students will practice doing exactly what they would be doing on the actual job.

Content Analysis

The content analysis gives an overview of the training. It will provide a guide for designing the instructional materials. This analysis is based on data gathered from the learner and context analyses, as well as interviews with Director Andy Carter and current Phonathon workers.

Software Training

This part of the training will cover the details of the calling software.

- How to read the information on the current call
  - Color codes
    - Green: on a call
    - Yellow: ringing
    - Grey: in between calls
    - Red: on a break/clocked out
  - Reading and understanding callees' information
- Navigation of the software
  - Donor information and statistics (launches during a call)
  - Information scripts for frequently asked questions
    - College and School Guide
    - Football Schedule
    - Frequently Called Numbers
    - Homecoming
  - Summary (callees' donation history and information)
  - Caller Statistics (summary of collected donations)
- Where to fill in the information they receive on calls
  - Filling in fields of callees' information
  - Logging whether the phone was answered or not
  - Logging whether or not they donated
- The different ways to log a call
  - Complete call options
    - Pledge
    - Already Pledged
    - No English
    - Refuse
    - Do Not Call
    - Out of Country
    - Deceased
    - Remove From List
  - Incomplete call options
    - Busy Tone
    - Answering Machine
    - Personal Callback

- ■ Not Available Two
- ■ Privacy Manager
- ■ Not Available
- ■ Whereabouts Unknown
- ■ Not Available One
- ■ Reassigned Number
- ■ Temporary Disconnect
- ■ No Answer
- ■ General Callback
- ■ Disconnect
- ■ Daytime Callback
- ■ Fax Number

Calling Training

This part of the training will go through the basics of the calling procedure.

- How a Phonathon phone call should proceed
  - Voicemail script
  - Answered phone script
  - Procedure for updating callees' information
  - Procedure for asking for donations
  - Procedure for taking payment information versus sending emails with information to pledge
  - Protocol for answering callees' questions
  - Steps for writing postcards to donors
- What to expect on a phone call
  - Typical scenarios for completing a call
  - Atypical but likely scenarios for completing a call
- How to be confidential
  - Payment information
  - Address
  - Donation history
  - Names
  - Phone number
  - Employment information
  - Spouse information
  - Email
  - Sex

Latecomer Training

This training is built specifically for people who miss the initial training days and is taught mostly online. All of the call training and software training content will be available online to latecomers.

Learning Objectives

The learning objectives define the expected outcome of training in terms of demonstrable skills or knowledge that will be acquired by the learner as a result of the instruction provided. Learning objectives are important because they provide trainees with a clear purpose to focus their learning efforts, direct the instructional designers of instructional activities, and guide assessment strategies.

Objectives

By the end of the training, trainees will be able to do the following:

1. Navigate the RNL Engage software to log call results with 100% accuracy either while they are on the phone with the donor or 120 seconds after the end of the call.
2. Navigate calls with potential donors so that they receive donations at least 30% of the time.
3. Interpret donor questions accurately and respond with correct and concise information without delay.
4. Navigate the RNL Engage software to access information scripts, call summary, and caller statistics.

Justification

One of the main goals at every call center is to limit the time spent on each call so that callers can make more calls and raise the potential for donations. Since Mercer Phonathon is essentially a call center, half of our criteria for the learning objectives are time-based.

Learning Strategies

Every person learns differently. However, there are certain constants to be considered when designing and implementing training. One rule of thumb, for example, is to change activities every twenty minutes. This is because the human mind finds it difficult to focus on any given activity for more than this time limit. By changing the activity, you are helping to keep learners engaged.

The Strategy

The most effective training courses follow a process, and the one we recommend follows a pre-instructional, initial presentation, and generative flow of instruction. The pre-instructional phase is what begins the training. It is meant to engage learners so that they have the motivation to apply themselves in training. The initial presentation is usually a demonstration that shows the learners how to do something or how something works. In the generative phase, learners are asked to perform an activity to ensure that they have retained the knowledge you've demonstrated.

In the following sections, we will explain our suggestions for learning strategies to use in the Phonathon training.

Software Training

- *Pre-instructional Phase:* Give an engaging story about the importance of knowing the software. Also, discuss shocking statistics about last year's number of donations and total contributions. Further, emphasize where the donations go and how it benefits the students.
- *Initial Presentation:* Play a video that provides an in-depth explanation of the various aspects of the software. This would explain the different ways to log a call, where to find information within the software, and where to fill in the information they receive on calls. Also, provide students with a well-designed document that can quickly and clearly direct students on how to log a call if needed.
- *Generative Phase:* Run a short Kahoot game to add a fun and effective way to assess knowledge transfer. Make sure to explain the correct answers after each question.

Call Training

- *Pre-instructional Phase:* Talk to the learners about how crucial proper call procedure and etiquette are. Emphasize the success rate of callers with stellar call etiquette and attitudes.
- *Initial Presentation:* Give a PowerPoint presentation on call procedure and etiquette. Emphasize key aspects of successful calls.
- *Generative Phase:* Have the learners demonstrate their knowledge through roleplaying with each other. Take the opportunity to observe how well the learners have retained the training and remind them of key points when you notice a mistake.

Latecomer Training

Latecomers will be instructed to go to the Canvas course, where they will be able to access the most important materials from the training.

- *Pre-instructional Phase:* In a PowerPoint, discuss shocking statistics about last year's number of donations and total contributions. Further, emphasize where the donations go and how it benefits the students. Talk about how important proper call procedure and etiquette are. Emphasize the success rate of callers with stellar call etiquette and attitudes.
- *Initial Presentation:* Provide a video that gives an in-depth explanation of the various aspects of the software. Also, provide students with a well-designed document that can quickly and clearly direct students on how to log a call if needed. Include the PowerPoint presentation on call procedure and etiquette. Emphasize key aspects of successful calls.
- *Generative Phase:* Use a short quiz to assess knowledge transfer. Make sure to have explanations of correct answers. Meet with latecomers to do a roleplay activity to evaluate their call procedure/etiquette skills.

Instructional Materials

This section of the report will analyze the current instructional materials. Based on our findings, we will make recommendations for new or updated materials. We will also provide reasoning for our recommendations to help Director Carter decide which materials he wishes to integrate into future Phonathon training programs.

Current Materials

Currently, the training program uses lectures and job aids. The lecture involves walking learners through the software using a projector and talking them through call procedure and etiquette. While this is effective, learners lack the hands-on approach that works best when learning how to use software and the practice they need for going through a call. The current job aids given include a script and a flowchart. The script is wordy and can not be used easily while on the phone. While the flowchart is less wordy, it is not very easy to understand. The following section lists our recommendations for software, call, and latecomer training materials.

Software Training Recommendations for Materials

This part of the training will cover the details of the calling software.

- *Video:* This will be a short to-the-point video to demonstrate the key aspects of the software. We believe the video will be beneficial because it will give students a set amount of time to become familiarized with the software. We plan on keeping this video between 10 to 15 minutes. A lecture that could quickly turn into 45 minutes of talking where students will begin to zone out. It is recommended that learning is done in sections of 20 minutes to keep the audience's attention.
- *PowerPoint:* A PowerPoint going through a more in-depth explanation of the different aspects of the software. This would explain the different ways to log a call, where to find information within the software, and where to fill in the information they receive on calls. A PowerPoint allows students to ask questions when needed. The PowerPoint would be paced by student understanding. Learners should be asked if they have questions or comments; however, if they appear to understand the material, the trainer can move on to ensure the learners do not lose focus.
- *Kahoot:* A short Kahoot game to add a fun and effective way to assess knowledge transfer. Adding a game to the training session makes learning more enjoyable. The audience of college students would appreciate this portion of the training because it is a fun, competitive, and nostalgic way to assess and solidify learning. Below is a mockup of the Kahoot game (Figure 1).
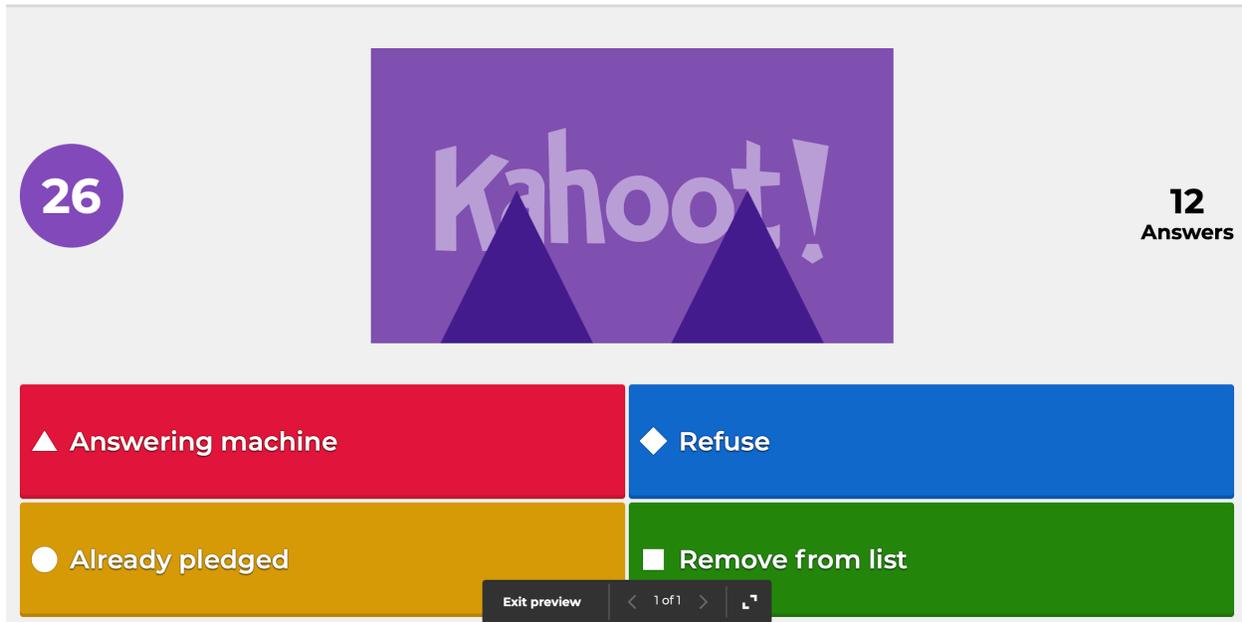
Which is not a complete call option?

Figure 1. Mockup of Kahoot Game

- *Roleplay activities:* Give the students real-life scenarios and see how they would log the call in the system. Run through giving students information and have them fill it out on the system correctly. By partaking in roleplay activities, students are increasing their transfer context. Having experience with the call system and seeing how a real call would go will make it more comfortable for students to transition from the training to actual calls.
- *Job aid:* A well-designed document that can quickly and clearly direct students on how to log a call if needed. Throughout the training, we can observe what students struggle with the most and place this on the job aid. Having a job aid to look at and easily comprehend while on the job will give students an extra boost of confidence they may need to excel with this work. This job aid must allow students to quickly look at it and get the required information to be useful in real-time.

Call Training Recommendations for Materials

This part of the training will go through the basics of the calling procedure.

- *Phonathon script:* Provide an outline of how a Phonathon phone call should be arranged. It will have the critical components of what needs to be said during every phone call. Mercer Phonathon workers will be encouraged to stick to the script since Director Carter stated how workers sometimes fail to ask for specific pieces of information. Below in Figure 2 is a mockup of the script.

Example Call Flow

Introduction:
Hello, I'm .... I'm a student at Mercer University. Is (callee) available?

Hi Mr./Mrs./Ms. ... how are you doing tonight? ... I'm calling for two reasons. 1) to update alumni information in our system. Do you have a few minutes to do that?

Updating Information
- Best phone number to reach you?
- Address still correct?
- Spouse's name correct?
  - Don't have a spouse listed, would you like to update?
- Job listed correct?
  - Don't have any job listed, would you like to update that?
- Email correct?
  - Don't have email listed, would you like to update that?

Thank you.

The 2nd reason I'm calling is the Mercer Fund.
Donors:
1st ask: I see you've donated in the past. Thank you. Ask for double the last amount donated. Would you be willing to make that gift tonight?

2nd ask: would you consider matching your previous gift of ...

3rd ask: we are looking for participation from all alumni tonight. The average gift we are receiving is ... would you be able to help us out with a similar gift? Your contribution will benefit student funds as well as increase our donor participation rate which is a factor in determining government support for Mercer.

Figure 2. Mockup of Phonathon Script

- *PowerPoint:* Talk to students about the expectations on a phone call and use graphics and bullet points to reinforce this. This PowerPoint will be entirely new for the training session. Even though some learners dislike lectures and PowerPoints, other learners would appreciate the presentation.
- *Job aids:* Documents that students can use to help them quickly navigate through a phone call. While students are preoccupied with holding a conversation with the potential donors, the workers will appreciate having a handy document (notecard) with essential information. It will be an efficient way to access key information without getting distracted from the phone call.
- *Roleplay activities:* Have students pair up and act as if they are calling each other. Provide the students portraying the donors with different scenarios to act out and provide the other student multiple different situations to navigate. Roleplay activities are beneficial in several ways. Role-playing provides a safe environment to encounter real-life scenarios for the first time, which builds confidence in student workers. Also, roleplay activities will allow student workers to handle difficult situations and develop creative problem-solving skills. Shown in Figure 3 is a mockup of the roleplay document.

Call Training Roleplay

Directions: With a partner act out the following 7 scenarios. If you are unable to act out the scenarios, write down the answer to the questions using 6-8 sentences. This activity does not require the use of a computer.

Scenario 1
The potential donor answers the phone is very aggravated that you called her while she was taking a nap. She curses and yells at you. The donor has a history of making large donations. How do you proceed?

Scenario 2
The person who answers the phone informs you that the person you are trying to reach is deceased. The person then tells you a long story about how the person passed. Will you allow the person to continue the story, even though 17 minutes has passed? How do you proceed?

Figure 3. Mockup of Roleplay Document

Latecomer Training Recommendations for Materials

This training is built specifically for people who miss the initial training days. It will be a Canvas course that covers the essential training from the formal training days. The course will involve the following training materials:

- *Video:* This video will be a screen recording of Director Carter walking the viewer through the calling software elements. Because this is latecomer training, and the course will be online, these learners will not be face to face with an instructor regularly. This video will help show them the important features of the software without the need for an instructor. Below in Figure 4 is a scene from the video.
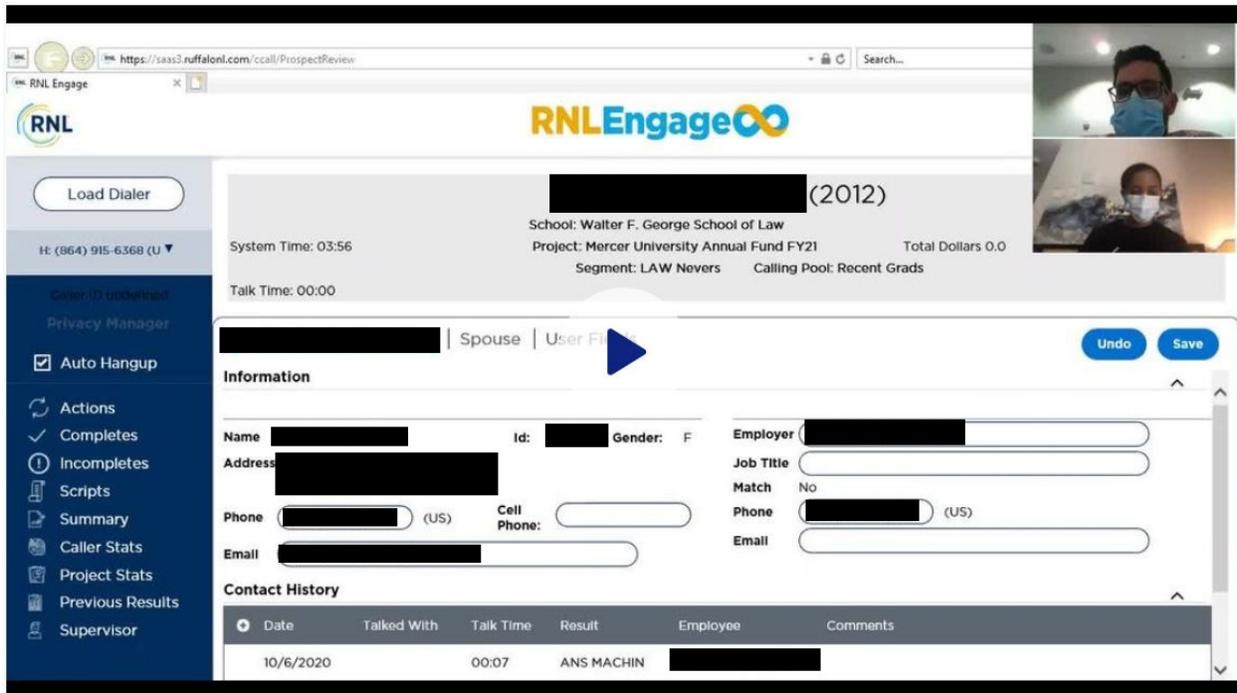
Figure 4. Scene from Training Video

- *Documents:* Arranged by section (calling software, procedure, and scripts), these documents will be posted to the course and be printable. Again, because this is latecomer training, students will not have the advantage of being with an instructor. These documents will go into more detail about the software features, how to long certain calls, calling procedures and etiquette, and call scripts.
- *Quiz:* At least one quiz covering the material from the video and documents will ensure that the learners have absorbed the training material.

Instructional Evaluation Plan

Evaluation is used to add quality and improve outcomes of training programs. Evaluation answers questions about training effectiveness. Through evaluation, trainers can learn what needs to be enhanced by seeing what learners had a hard time retaining or never learned in the first place.

We have decided to use the Kirkpatrick model of evaluation to test our training effectiveness. The Kirkpatrick model consists of 4 levels to assess training: 1) reaction, 2) comprehension, 3) transfer, and 4) Return on Investment (ROI). The main reason we chose this model is because of the transfer criteria. We will be training learners on how to make Phonation calls effectively, so it is crucial that they can transfer that knowledge to real Phonation calls. We also feel that ROI is important to show what has been gained through training.

Level One: Reaction

The objective of this level is to evaluate how the Phonathon workers react to the training model by asking the trainees questions that will convey their thoughts. The questions will allow us to figure out if the trainees enjoyed their experience and found the material useful. It is essential to assess how invested the trainees were in the learning.

This level can be evaluated by having the trainees complete a short 3-question survey that encompasses a 5-point Likert Scale. The questions should be simple and straightforward. For instance, the best option is to have the trainees circle a number one through five that best represents their level of agreement with a statement. The scale is typically arranged in the following order: 1) Strongly disagree; 2) Disagree; 3) Neither agree nor disagree; 4) Agree; 5) Strongly agree.

Primarily, this phase collects data on overall satisfaction with the training. If the results are negative or neutral, the training needs to be improved in regard to interesting activities and level of engagement. The survey should ask questions about the learners' feelings about specific aspects of the training, such as using Kahoot quizzes or videos.

Level Two: Comprehension

The objective of this level is to gauge the trainees' level of understanding of the material. The comprehension level is more difficult to evaluate than level one. It entails assessing the trainees' new skills, knowledge, and attitudes. It also considers what the trainees learned or did not learn.

The techniques used for this level vary. They can range from formal tests and self-assessments to team assessments. To understand the trainees' level of comprehension, the trainees should take a pretest before training and a posttest after training. Comparing the results from both assessments or tests will allow the evaluator to measure how much the trainees have learned.

The information gathered from the assessments will allow us to see whether the students fully understood what was going on in the training session. This knowledge can act as the driving force for making drastic changes in the training. For instance, maybe the students were not able to comprehend the material because of the pace. On the other hand, perhaps the students were able to understand most of the material. That would signify that the training is effective and a success.

Level Three: Transfer

This phase of the evaluation process strives to determine whether the skills, knowledge, and attitudes taught in training were applied to the workplace. In this context, this phase will examine whether or not the learners in the Phonathon training have used what you have taught to improve their call and software skills.

This evaluation phase takes place 3-6 months after the training in order to give the learners time to start applying the training. The simplest and likely most effective method for this evaluation step is observation. Having the instructor(s) observe some of the learners at work will provide insight into their applied knowledge, skills, and attitude. If the learning has lost its effectiveness, it may be necessary to hold a refresher course, or simply adjust the next training session to accommodate your observations. For example, if you notice that students have stopped following the script for leaving voicemails, you might focus on the script's importance in the next training session.

From this phase of evaluation, we want to gauge how well the training has stuck with the learners. This will be primarily qualitative data, such as how well the learners speak with the customers. However, quantitative data, such as how many donations were earned by each student or how long it took to log calls, are also essential to gather at this stage.

Level Four: Return on Investment (ROI)

This phase often sums up the total effectiveness of the training. Return on investment (ROI) in this case will be determined by a change in donation totals, the number of donors, and the number of credit card donations. The software already tracks these numbers, but analyzing them for shifts after the training will be vital in determining the effectiveness of the training.

The most efficient way to measure these changes would be by using a control group. However, since there are so few learners, and because it would be illogical to expect untrained students to work Phonathon, this won't be possible. Fortunately, comparing the improvements in donations, donors, and credit card donations after the training to the years previous is a viable replacement for a control group in this case. For these reasons, we recommend analyzing the aforementioned statistics at the end of the year and comparing them to the same statistics from the years before the training was changed.

Using the data collected both at this level and the last, you can determine how effective the training was by comparing the two data sets. If the number of donations, the number of donors, and/or the number of credit card donations has increased with time, then the training can be considered a success. If not, we must look at all the data we have gathered from the evaluations to see what kind and levels of changes need to be implemented.

Summary

To evaluate the training, we recommend using a survey to evaluate learner reactions, observing the learners 3-6 months after the training to assess retained knowledge, skills, and attitude in the workplace, and analyzing the change in the total number of donations, donors, and credit card donations using the software after the Phonathon. These methods of evaluation will help to assess both the effectiveness of the training and the learners' proficiency in Mercer Phonathon.

Conclusion

To summarize everything, Director Andy Carter asked us to assess the current state of the Mercer Phonathon training and make suggestions for changes to the program to make it more efficient. We had to first assess whether or not instructional training was needed. That was called the needs assessment. There were gaps in the student workers' knowledge, attitude, and skills. We knew those gaps could be resolved by instructional training.

Next, we had to analyze three key components. The first was learner analysis, which involved us looking at the learners' demographics, educational background, work experience, and other things. The second was context analysis, which encompasses orienting context, instructional context, and transfer context. It ultimately involved us assessing why the learners come to the training; the physical environment, resources, and equipment with which the training is given; and how the learners will use their training in the workplace. The last analysis we conducted is called content analysis. It allowed us to figure out what content needed to be covered in training. We ended up splitting the training into three parts: software training, call training, and latecomer training.

Afterward, we developed the learning objectives and learning strategies. The learning objectives define the expected outcome of training in terms of demonstrable skills or knowledge that will be gained through training. On the other hand, learning strategies are basically the methods we will use to ensure the workers learn what they need to.

Towards the end, we created a list of instructional materials that would be used during training. For the software training, we recommended using a video, ppt, Kahoot game, roleplay activities, and a job aid. For call training, we suggested the use of a Phonathon script, ppt, job aid, and roleplay activities. For latecomer training, we decided the entire thing should be online. It would include an online video, online documents, and an online quiz at the end.

To wrap things up, we created an evaluation plan. Evaluation answers questions about training effectiveness. We decided to use the Kirkpatrick model of evaluation, which consists of four levels to assess training.

Once again, thank you for giving us the opportunity to gain hands-on experience in instructional design. Hopefully, you will use the information discussed in this report to further improve Mercer Phonathon. We wish you the best of luck!