ABSTRACT

A TECHNICAL COMMUNICATION INTERNSHIP WITH AN eCRM SOFTWARE COMPANY: SYNCHRONY COMMUNICATIONS, INC.

by Daniel S. Byrne

In this report, I discuss my internship with Synchrony Communications. Synchrony is an eCRM (electronic Customer Relationship Management) software company dedicated to developing world-class, cutting-edge technology. As an intern in the Information Development department, my work focused on developing documentation and training for Synchrony’s eCRM software package. My projects deliverables included a user’s guide, training guide, and multiple project plans. The dates of my internship were July 2nd, 2000 to January 5th, 2001.

Chapter One of this report describes Synchrony Communications and the software it produces. Chapter Two discusses my major project work. In Chapter Three, I discuss my work on developing a specific user guide. Chapter Four explains how I used the five-phase publications-development model in my work. Chapter Five covers my lessons learned.
A TECHNICAL COMMUNICATION INTERNSHIP WITH AN eCRM SOFTWARE COMPANY: SYNCHRONY COMMUNICATIONS, INC.

An Internship

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SYNCRONY COMMUNICATIONS, INC.

Located in Cincinnati, Ohio, Synchrony Communications, Inc. is a software company that specializes in producing a single electronic Customer Relationship Management (eCRM) application, which allows our customers to better meet their own customers’ needs through tracking and managing customer information. Customer Relationship Management applications are designed to improve the business-customer relationship by helping both parties. For example, if you ordered a new table over the web but a leg was broken when you received it, you would call the company’s Customer Service department. When you call their Customer Service department, your entire experience is routed through a software application. First off, the software will route your call to one of several groups of representatives based on the number you called. Once a representative answers your call and starts helping you, all of your information is tracked and managed within the software. Conversely, to better help you, the software also provides the representative with a knowledge base that includes answers and solutions to customers’ most common questions and problems. This procedure helps the customer in that the representatives more information to better solve the problem. It helps the company by allowing them to provide more consistent solutions to customer issues while gathering valuable information on multiple aspects of their customers.

In July 2000, I began working with Synchrony as a full-time, salaried employee within their Information Development team as the Team Lead for Training & e-Learning. While at Synchrony, I worked on a variety of documentation, training, and e-Learning projects geared towards improving our efforts in supporting customers and users. In my work at Synchrony, I have had the opportunity to draw upon my MTSC studies and previous work experiences, as well as gain knowledge of new areas that I had been eager to explore.
In this chapter, I provide the following information:

- General description of Synchrony Communications
- Description of the Synchrony Application
- Company’s structure
- Information Development Team’s structure
- My work and role at Synchrony

**GENERAL DESCRIPTION**

Mark Richey, Synchrony’s founder and CEO, began the company in 1997 with only five employees working together to develop the initial Synchrony application. Today, though, the company has grown to approximately 150 employees and now occupies the entire fifth floor of the Atrium II building in downtown Cincinnati. When Synchrony began, the public saw it as one of the many Dot Com start-ups that were appearing throughout the country. Synchrony did provide its initial product as an ASP (Application Service Provider), which is web-based and a common Dot Com solution model. (Dot Com refers to internet-based companies. For example: [www.oracle.com](http://www.oracle.com). It refers to the “.com” portion of the Internet address.). However, while Synchrony used the web as its primary delivery tool, it never considered itself as a Dot Com company. Instead, Synchrony has always focused on providing a viable business product and service, and merely uses existing technology (the web) as the medium by which we offer our product. In recent months, Dot Com start-ups having been going under by the dozens, while some, like Synchrony, are still around because they focus on a strong business model, not on the latest technology trends.

While Synchrony is not like most Dot Com companies, it does resemble them in that it has a very open-minded, fun, and start-up feel to it. Considering that about half of the company has worked in the Silicon Valley at one time or another, it definitely has a West-Coast technology
company attitude. This helps explain why the company has made available a ping-pong table and video games to let us blow off steam; half the staff sits in odd-looking, inflatable, plastic furniture; we often see a football flying through the air as we pass by a meeting; and, inevitably, someone (usually a manager or VP) is initiating an early happy hour at the end of the week.

While there are fun and games at Synchrony, there is more work than fun. The CRM market does not have a current clear-cut leader, and we are now one of the few companies that has a good chance of becoming one of the top few. While we have a chance, it is a very close race; and there is a lot of work that we have yet to do if we are going to make it. Furthermore, Synchrony is still privately held, and the company would like to go public, as would all of its employees. If the company is going to succeed publicly, we have to ensure that we have an exceptionally strong product. The company’s situation boils down to hours and hours of work developing features that our programmers have never built before. When we step back and look at it, the entire situation is somewhat daunting. Most people work very late hours, weekends, and make many personal sacrifices in order to meet company deadlines and goals.

**THE SYNCHRONY APPLICATION**

The Synchrony application is a revolutionary e-Customer Relationship Management solution that allows businesses to serve their customers across several channels of contact—including voice, e-mail, FAX, and web chat—via a single web interface. When a customer contacts a company’s service representative through any of the channels, the system retrieves that person’s information and prepares it for the service agent. The system then routes the customer to the first available customer service agent. When the service agent handles the call or e-mail, that agent has all of that customer’s previous information at hand, as well as a pre-built knowledge repository that contains answers to the top 80% of questions asked by customers. The streamlined process and concise knowledge repository allows agents to provide customers with an unmatched customer
service experience, building the satisfaction and loyalty that are essential to the success of businesses.

Furthermore, Synchrony offers its application as both a subscription service via the Internet and as a “Premise” version that allows customers to house the system at their location. The Internet subscription service dramatically reduces implementation costs associated with traditional CRM investments, such as equipment, maintenance, additional IT staff, and lengthy implementations. Customers pay usage costs as they are incurred, and can expand their capacity simply by adding additional agents as long as the agent has a PC and an Internet connection. With the subscription model, Synchrony assumes total responsibility for the solution. If the customer chooses the Synchrony Premise version, however, the customer can fully customize the Synchrony application within their company, and can ensure the solution ties seamlessly into their infrastructure. While the Premise option requires more responsibility on our customer’s behalf, it has the added benefit of integrating Synchrony into their other applications and their IT environment.

**Synchrony Team Structure**

Synchrony’s 150 employees are trained in a wide variety of fields. Synchrony employs programmers, project managers, sales people, and technical writers, among others. The following is a description of each of the major divisions in which these people work at Synchrony:

- **Products Group** – The Products Group is the largest division at Synchrony and includes the programmers, developers, product/project managers, technical writers, and instructional designers. The major teams include:
  - The Product Development Team: the programmers who develop and upgrade the core application.
The Product Management Team: the team members who oversee work with clients, determine new features and functionality that will go into future releases, and coordinate the work of all the teams.

The Quality Assurance Team: the group that ensures that the product works the way it is supposed to once it is completed and that checks for bugs/errors.

The Information Development Team: (where I work) the team that is broken down into Documentation and Training & e-Learning and that oversees the development, management, and distribution of all the documentation, on-line help, instructor-led training, and web-based training courses for all the tools within the product.

- Professional Services – the department that works with clients to implement our product and delivers the training to the clients.

- Sales & Marketing – the group that is responsible for selling the Synchrony product and developing all of our marketing collateral.

- Operations – the group that is responsible for human resources and office management duties and for ensuring the company runs smoothly.

Management Style
Synchrony promotes a very open management style in which individuals are loosely supervised. Due to pace and volume of work, senior managers seldom have the time to look over our shoulders. Instead, they expect employees to identify the work that needs to be done and communicate issues effectively. If there is an issue, Synchrony expects its employees to bring it to management’s attention as soon as possible. The employees are truly empowered, and the managers are there only to provide general guidance. Synchrony expects the utmost professionalism in project work—assuming that the employees will do whatever it takes to get the job done. As a result, the employees take great pride in their work and give many hours of overtime to ensure each job gets done well.
**Team Collaboration**
Synchrony thrives on teamwork. With tight deadlines, the teams have to communicate extremely well. Furthermore, individuals may move among teams when they have some down time and/or another team needs additional support. The company is still relatively young and growing rapidly, so essential personnel can be left out of the loop on occasion. The processes and communication channels are still being developed and are not fully in place. However, when people are left out of the communication loop, everyone pulls together to ensure the miscommunication is rectified immediately, and to take steps to ensure the issue will not occur again. The bottom line, and general feeling throughout the company, is that we are all in this together.

**MAJOR PROJECTS**
During my internship, I was responsible for developing end-user documentation and training for the Synchrony application in several releases of the product. Since I started working for Synchrony as a full-time, salaried employee, the duties I performed during my internship period have carried on to my current work. However, in this report, I focus on the activities I performed during my internship. In the course of my internship, I performed the following tasks:

- Developed user guides and end-user training for various Synchrony tools and features
- Performed needs analyses for training and documentation
- Created project plans for various Information Development projects
- Designed initial methodologies and development procedures for documentation and training
- Developed an e-learning strategy for implementing an e-learning solution
- Edited user guides and training manuals
- Managed training development projects

In the following chapter, I discuss the above activities in more detail.
While working within the Information Development team, I was responsible for seeing several projects through all the development phases: needs analysis, content development, and testing.

During my internship, however, I took three specific roles within the team:

- Documentation Developer—Developing hard-copy user manuals for the Synchrony application.
- Instructional Designer—Designing training classes and web-based training courses for the Synchrony application.
- Manager—Overseeing all training and e-learning projects.

The Information Development team was relatively small, consisting of only four people. We were continually trying to grow the team and were always looking for good people since our workload was constantly growing; however, timing and funding was everything, and we occasionally had to put off hiring until we received more funding. Furthermore, we had difficulty finding qualified candidates for the positions we wanted to fill. Therefore, we used contractors to help support our team where appropriate. Since the team was small, managers sometimes acted as developers and reported to other managers for specific projects, they reversed the managers’ roles on other projects. This process complicated work relationships, but it helped us build a strong Information Development team. I discuss each of my roles, including that of manager, in more detail below.
MY ROLE AS DOCUMENTATION DEVELOPER

When I first started my internship, my first duty was to develop a user manual for two tools within the Synchrony application: Real-Time Monitor (RTM) and Reporting. In order to develop the user manuals, I had to learn the CRM application as a whole, gather requirements for the specific documentation, and then develop the user manuals.

While I was charged with developing documentation for only two specific tools within the application, I had to learn the entire product in order to understand how it worked and how the tools I was documenting fit into the application. I spent my first day and a half working with the entire application to develop a basic understanding of how it worked. After becoming familiar with the application as a whole, I moved on to learning the Real-Time Monitor and Reporting tools.

Real-Time Monitor (RTM) is a tool that our clients’ supervisors use to monitor their call centers in real-time. The RTM records data on interactions (phone calls, e-mails, chats, etc.) received by each employee. The data is then summarized in tabular and graphical formats, including line, bar, and pie charts. This type of information is very helpful when customers need to know if they are overstaffed, if someone needs assistance, or if there is a particular trend/issue that is developing in the responses. The Reporting tool is a Business Intelligence application that gathers all of the data on interactions and how they are handled, and then provides in-depth reports on that data. This is similar to the RTM, but Reporting provides much greater detail and the ability to manipulate the data within the reports. Conversely, RTM offers the data as it occurs and can draw data only from the past 24 hours; Reporting provides access to data older than 24 hours and can retrieve statistics from the time when data was first collected.

Once I felt I had a decent understanding of the RTM and Reporting tools, I began working with senior managers, developers, and product managers to outline the content of the user guides and define our audience. Luckily, the previous manager had begun performing some
of this preliminary work, so I was able to use her work to get started. In addition to the previous
manager’s work, I interviewed the managers and developers to determine what they thought we
should include in the content. With the managers, we focused more on what companies would see
as valuable, such as how the application empowers their agents or how it makes their jobs easier.
With the developers, we focused more on how a person actually uses the application. After
working with both the developers and manager, I was left to put the finishing touches on the
outline on my own.

Once I had defined the content and audience for the manuals, I began working on
developing the actual content. After each draft, I would first submit the documentation to another
writer for editing and then to SME’s for reviews. After several cycles of reviews, I pulled
together the final draft and sent it to production to be distributed with the next release of our
software. (I discuss my work on developing the user guides for RTM and the Reporting tool in
greater detail in Chapter 3.)

**MY ROLE AS AN INSTRUCTIONAL DESIGNER**

After my team had completed all of the documentation for the next release of the Synchrony
application, I developed training classes, including Student Guides, to be used in our training for
the RTM and Reporting tools. In developing the Student Guides, I used the documentation I had
previously developed as my source information. I used our trainers as my primary SME’s for
developing the training, and gathered their input on the flow of the courses. After I received their
input, I began outlining the courses and then started inserting content into the training guides. The
training guides required some modification from the previously developed manuals because we
needed to ensure that we implemented adult learning and instructional design principles
throughout the training. Modifying for instructional design principles required the training
information to be chunked into more specific sections, with sufficient breaks for students to do
coursework. Furthermore, I was able to remove some of the detailed screen shots since students would have the application in front of them as they went through the training, and the trainer would be there to clarify any questions. The training guides also required a slightly modified layout than that of the user guides in order to allow students to take notes while they went through the training. Finally, I had to structure the information into specific modules instead of chapters so that training could be customized for the client’s specific needs. The modular format also allowed me to organize the information in a way that was more conducive to converting the information to a web-based training format. (At the time of this report, the training guides were out for their first reviews, and I am awaiting feedback. However, I plan to follow a review and modification process similar to that which I followed with the user guides.)

**MY ROLE AS A MANAGER**

As a manager, I had a lot of work to complete in order to strengthen the Information Development team from the time I started with Synchrony. The biggest issue was that there were not many development processes in place for documentation or training. Furthermore, there were no documentation standards or style guides. In addition to lacking processes and methodologies, I also needed to develop a strategy and project plans for documentation, training, and e-Learning projects. Finally, I was responsible for moving forward with managing all aspects of the training and e-Learning development projects. In performing my managerial duties, I reported to the V.P. of our department, Sunil Potti.

**Processes & Methodologies**

One of my first tasks as a manager was to develop training and e-Learning development methodologies. Since we were on such tight timeframes, I developed an overall project plan, outlining the strategy we would take for both training courses and our e-Learning site. In doing so, I based the processes loosely on the PDCA (Plan – Do – Check – Act) model, in which a
person plans the project, develops the product, checks it, and then acts appropriately (revise, implement, etc.). I had decided to use the PDCA process for three reasons: 1) most professionals in the business world have been exposed to this core methodology since it is taught in most undergraduate and graduate business courses, 2) I was very familiar with the process from my undergraduate business studies as well as from my extensive work in developing project management training guides for Procter & Gamble, and 3) I had used this process before with great success. (The concept of the PDCA Cycle was originally developed by Walter Shewhart, a pioneering statistician who developed statistical process control in the Bell Laboratories in the US during the 1930s. People often refer to the cycle as 'the Shewhart Cycle'; however, it was taken up and promoted very effectively from the 1950s on by the famous Quality Management authority, W. Edwards Deming, and is consequently known by many as 'the Deming Wheel'.)

While I originally developed a combined project plan document, I had to break the plans into two separate documents due the scope and nature of each project, partially due to the fact that we had more planning to do on the e-learning project than on the training project (see Appendix A for a copy of the e-Learning Vision). In the project plan documents, I noted the fact that we planned to use the defined methodologies as a general outline in order to provide some sort of structure to our efforts. In using these processes, we would modify them regularly to document changes necessary for our specific needs. I envisioned a final methodology developed through continual improvement and modification of the outlined processes through trial-and-error results as we used them. (At the time of this report, we have not gone all the way through the complete methodology since I developed it, but we are already modifying the process to specify our specific situations.)
Standards

Another responsibility I had as manager was to ensure that we developed a specific set of standards to use when developing documentation and training. The standards we developed included a style guide, which defined specific spellings and usage, templates for user and training guides, and basic development processes based on the training methodologies, but providing more minute details. I did not directly develop these standards myself, but instead I delegated to others on my team while I provided continual input and feedback through the creation of the standards. (At the time of this report, we had just started using these standards and were still fleshing out some of the details. However, we had already started to see the improvements that had come about due to the use of the standards we had put in place). More than anything, the existence of the standards document made us more aware of issues we had not yet considered and helped us identify additional standards we had to bear in mind.

Project Management

A major responsibility as manager was managing the various training and e-Learning projects. I had to ensure that the team was meeting deadlines and creating quality materials. Furthermore, I was responsible for coordinating all development efforts, including planning, mitigating risks, handling issues, meeting deadlines, submitting documents to SME’s and the Quality Assurance team for review, and working with outside contractors. The training courses I managed were developed primarily in house, with little work done by contractors. However, the e-Learning project relied heavily on outside contractors, a practice that introduced an entire new set of issues connected with managing outside risks, deadlines, and quality, and required a variety of skills unneeded in our internal projects.
CHAPTER THREE

CREATING USER GUIDES: A CASE STUDY OF “SYNCHRONY REPORTING”

As I mentioned in the previous chapter, one of my major responsibilities at Synchrony was to develop a user guide for the Synchrony reporting tool. This section outlines my experiences in developing this user guide from scratch. I present my experiences as they relate to the five-phased publications-development model outlined by JoAnn Hackos in her book, Managing Your Documentation Projects, which I used as a basis in developing the methodology in previous chapter. I typically use her method, or a variation of it, for most of my documentation work, and it provides a good basis for most documentation projects while still allowing me to stay within the guidelines of other major project management methods. These phases include:

- Phase 1: Information Planning
- Phase 2: Content Specification
- Phase 3: Implementation
- Phase 4: Production
- Phase 5: Evaluation

PHASE 1: INFORMATION PLANNING

As defined by Hackos, the major parts of the Information Planning phase are the Information Plan and the Project Plan. In the past, I had usually developed these plans or followed the plans after someone else had developed them. When I started at Synchrony, my manager explained to me that I was going to be developing the Synchrony Reporting user guide, and I began to inquire about these plans. When I found that neither of these plans had been developed, I inquired about any input my manager might have in developing these plans. Much to my surprise, he told me
that he didn’t think the plans were necessary. The thought of not using project plans was quite a
shock to me considering that I had always had some form of a plan to base my development on.
In discussing my manager’s thoughts with him, he told me that we were on an extremely tight
deadline, and that the major goal was to “just get something out there.” All I had to go from was a
deadline for a first draft and a deadline for a final draft.

After my meeting with my manager, I went back to my desk wondering how I was going
to guide my work. I began talking with my peers, and found that a previous manager had
developed an Information Plan for the overall documentation efforts. After some searching on the
company network, I finally found the plan. It was quite dated and did not include information on
my specific documentation since she had not foreseen developing these manuals at that time.
However, the Information Plan did include some very helpful information, such as an audience
profile, major tasks and goals for the audience, and the environment in which the documents are
typically used. This information gave me most of what I needed, even though it was dated. In
reviewing the information thoroughly, I adapted the previous manager’s plan to the needs of my
specific documentation. While not all users would be using the reporting documentation, the
previous manager did include some information on the users who would be using my
documentation in her audience profile, so I focused my development activities on that audience as
best I could.

As for a project plan, I had several documentation project plans I had developed at my
previous job. I inserted my deadlines into one of the project plans and modified it further to allow
for the specific project and tight deadline. While management was not interested in this detailed
project plan at the time, I used it in conjunction with the old Information Plan to help me manage
my project as I started developing the documentation.
**PHASE 2: CONTENT SPECIFICATION**

The Content Specification phase requires further development of the project plan and audience analysis. Specifically, it requires that writers learn as much as they can about their audience, how they will use the documentation and the software (or tool) being documented. The writer then modifies the project plan to reflect additional tasks he/she needs to perform to meet the audience’s needs within the documentation. While I wanted to perform this task and felt that it would be extremely helpful to my development efforts, I did not have the time to effectively complete it. Instead, I chose to focus on learning the products I had to document as best I could using myself as a “typical” user. I did not fit the audience profile exactly, but I was new to the tool, which I thought would help me in further identifying the users’ needs. Within the tight timeframe, I was barely able to learn the application well enough for basic usage, anyway I continued to learn more after I began developing the documentation. (I discuss learning the application further in the next section, *Phase 3: Implementation.*)

The fact that I was unable to complete the audience analysis did result in some issues with the documentation. Specifically, the original analysis

The two main pieces of the original audience analysis consisted of an audience profile and a task analysis. The audience profile was a grid showing the various user types and key information about each. The task analysis was a list of tasks users perform to complete their jobs, independent of the Synchrony product. The following table is the audience profile taken from the original audience analysis (I modified the table for this report by removing two user groups, Agents and Supervisors, since they do not apply to the Reporting documentation):

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Operations Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Typically a college degree in such majors as Management and Business</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Analyst</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Typically a college degree in majors such as Business, Computer Science, Accounting</td>
</tr>
<tr>
<td></td>
<td>May have a graduate degree such as an MBA</td>
</tr>
</tbody>
</table>
In examining the audience profile, it is incomplete in several respects. First, it excludes one of the most important groups who use the data from the reporting tool: senior executives. Many vice presidents, directors, and other senior executives use the data from their reporting tools to help
make high-level business decisions. They do not, however, typically use the software themselves. Instead, they tell an analyst or supervisor what data they would like to see. Excluding this audience created a problem since we did not plan for the situation where the executive goes to a supervisor and asks to see a certain set of data. The problem that arose was that our software did not always provide the exact data the executives wanted to see, and many supervisors were unsure of how to get the data or if they could get it at all. If the executives, the ones who sign off on the bill for Synchrony, think that they cannot get the information they want out of our product, it reflects poorly on the software. Needless to say, this issue was at the top of the list for the next revision.

The second issue with the original audience profile is that the task analysis did not reflect how most of our customers’ analysts would use the reporting tool. For example, it did not go into what types of data the analysts would need to see to the level of detail we needed. Hence, when Synchrony designed specific reports to meet our customers’ needs, there where many reports that were not included. This exclusion of reports required analysts to go digging for the data they needed, and to complicate the situation further, our data was not organized in a way that analysts were use to seeing. While finding out what types of reports analysts would need and how they are use to seeing their data is not a function of the Information Development team, we could have mitigated this risk sooner if the Information Development team had done a more thorough task analysis. The table below is the original task analysis for analysts.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyze real-time data</td>
<td>The Analyst wants to determine what is going on in the contact center at any one time; for example: how many calls are in the queue, how many agents are currently handling a call</td>
</tr>
</tbody>
</table>
| Analyzes historical data to determine ways to improve customer satisfaction, business process, and so on | Analyst want to derive the following types of historical information:  
- What times of day the call volume is heaviest—to help determine whether to add agents, offer overtimes, when should breaks and vacations be taken.
- Whether customers are increasingly contacting the center more by email than by chat or phone—to determine whether more agents need to be devoted to handling emails
- Call abandon rate—to determine whether calls are getting picked up quickly enough |
<table>
<thead>
<tr>
<th>Tasks</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Time it takes to process events—to see whether more agent training is required</td>
<td></td>
</tr>
<tr>
<td>• Average answer time—to see whether the answer time is meeting established benchmarks and react accordingly</td>
<td></td>
</tr>
<tr>
<td>• Frequency of repeat customers—to determine why the center is not handling their problems, is it a training issue, Total Calls for a particular time period versus total calls logged into the system by an agent—to ensure that every call gets logged.</td>
<td></td>
</tr>
<tr>
<td>• Top twenty issues in a support environment—to determine whether the customer needs additional information to help himself. For example, add a troubleshooting topic to the FAQs web site that discusses the most frequently-asked questions, problems.</td>
<td></td>
</tr>
<tr>
<td>• The amount of business response cards sent in versus how many were distributed—to determine the response rate.</td>
<td></td>
</tr>
<tr>
<td>• Which products are selling well—to determine sales trends</td>
<td></td>
</tr>
</tbody>
</table>

**PHASE 3: IMPLEMENTATION**

The Implementation phase is where writers actually develop the documentation. In this phase, the major tasks typically include those outlined in Hackos’ method:

- Documentation Style Design
- Content Development
- Informal Draft Reviews
- Formal First Drafts
- Formal Second Drafts
- Final Approval Drafts

As I previously mentioned, I had very little time to develop the documentation. Instead of following the above steps exactly, I chose to forego the Formal Second Draft and go straight to the Formal Approval Draft. The following sections describe my experiences in each step.
Designing Documentation Style

The team already had a template in place for the document style, specifically, the Information Development team had already decided to use DocToHelp to develop our on-line help for the Synchrony application. DocToHelp provides standard document templates in order to more easily convert the documents to on-line help. Before I started with the company, the team had modified the DocToHelp templates in order to meet the company’s needs. After reviewing the templates, I thought they were pretty solid. My major input, however, was the way in which we presented the information. While the current style effectively presented the content, I thought that it would be more helpful to break the information into sections that focused more on the users’ functional needs, sections that focused more on how to do what they needed to do instead of focusing on more theoretical concepts.

Developing Content

To learn the Real-Time Monitor and Reporting tools, I first had to gain access to the development environment since both were still in the development phase. When a part of the application is in development, it resides on a specific server to which only developers and programmers have access (so as to minimize the chance of someone accidentally corrupting the code). Naturally, I had to overcome some undue roadblocks in order to get access to this server. Programmers are very defensive about their code, as they should be. They spend literally thousands of hours developing it and accidentally changing the slightest bit of code can cause more work than it took to develop it the first time around. However, in order to have documentation ready to distribute with the next release of the product, I had to have access to the development environment. I worked with the programmers and other managers to convince them that code could remain clean while I worked with the latest version of the tool. After about two days, I finally got the login and password for the development servers and began learning the RTM and Reporting tools.
The RTM tool was relatively straightforward and easy to learn, so I spent only about half a day learning the product before I moved on to developing the documentation requirements. The Reporting tool, on the other hand, was very complex, and I ended up spending a week becoming familiar with it. In working with the Reporting tool, I learned that we did not develop it in-house, but that we converted another company’s existing application to fit our needs. This knowledge allowed me to take an on-line training course that the other company developed for their application. Luckily, the training really shed some light on our version of the application and helped me to get up to speed more quickly. After about a total of a week and a half, I felt I was ready to move forward with developing the documentation for our Reporting tool, but I knew I still had a lot to learn.

After becoming familiar with the RTM and Reporting tools, I had to define exactly what the documentation should include. I spent several days working with managers, developers, and product managers discussing the content. First, we needed to define our audience. Luckily, the person whom I replaced had already performed an audience analysis several months earlier (as discussed in the Phase 1: Information Planning section of Chapter 3). This was tremendously helpful because we were on an extremely tight deadline. While the audience analysis was done before our customer base shifted slightly and its sample seemed small, it still provided invaluable information. In addition to the audience analysis, we also had to define what features and functionalities we were going to include, whether to include conceptual information or limit ourselves to functional information, and in what ways we would use graphics and screen shots. After referring to the audience analysis and working with the developers and product managers, we decided to include:

1) All features and functionalities so the guides could be used as complete reference manuals,

2) Conceptual information in order to help provide meaning for the steps, and

3) Screen shots for each step where the screen changed significantly.
After defining the initial requirements, we realized that both documents were going to be much longer than we had anticipated. The RTM manual was going to be only slightly larger, since the tool was not so complex or cumbersome. However, the Reporting documentation was going to be much larger than the approximately 75 pages for which we had planned. Therefore, we agreed that the first release of the Reporting documentation would not be final draft quality, but second draft quality due to our time limitations. In addition, we decided that we would leave the document as a second draft until the product was redesigned, which was to happen within the next three months.

My first step in developing the actual content was to sit down with the product and workflows, which were developed by the programmers to depict the processes the user would follow while using the tool. The workflows allowed me to create a rough outline of the chapters I needed to create before starting to document the system. I then began following the workflows in the product myself and documented the steps I took as I completed them. After completing a task, or series of steps, I then went through them again to capture the appropriate screen shots to include in the documentation. I spent approximately a week developing the first cut of the steps and processes, after which I went back to the developers to clarify issues and questions that had arisen while I was documenting the reporting tool. After clarifying the steps, I then began building conceptual information, such as the tool’s purpose, benefits, and users, for each functional chapter as well as for introductory chapters. Once I had developed all of the chapters, I pulled them together from the separate MS Word files into one document. I then went through the entire document performing a self-edit to check for spelling, grammar, and technical accuracy. After the self-edit, I then used the document as the audience would while working in the program, making changes as necessary when as I identified missing and incorrect information. Finally, I prepared the document for the informal draft review.
Informal Draft Review

My first step in the informal draft review was to submit the document for a peer review. After a coworker reviewed the document, I made the changes he identified. I then submitted the draft to the SME’s, including managers and developers, to get their feedback. Due to their large workloads, I had to wait several days before receiving feedback. As I had expected, there were many changes I needed to make to the document. Most of the necessary changes were to clarify how the application worked or to fix technically incorrect information. I implemented the changes and ran through the document once more while simultaneously running through the system to identify technical inaccuracies. Afterwards, I prepared the document for the formal first draft review.

Formal First Draft

For the formal first draft review, I submitted the document to seven of SME’s, including managers, programmers, sales, marketing, and training staff. I knew that I would have to wait a while in order to receive feedback and that there was a good chance that some people would not get a chance to review the document fully. In order to help mitigate this risk, I set a review meeting for the following week, giving the SME’s sufficient time to review the document. At the meeting, I first took about fifteen minutes to review the document at a high level. After my overview, I asked for feedback. With so many people, the entire process took just over an hour and a half. However, having everyone in the same room allowed us to answer questions I would not have been able to answer on my own, as well as to clarify conflicting issues since the individuals with opposite opinions could work out the problem among themselves instead of using me as a go-between. Once the meeting concluded, I went back to my desk and started making the necessary changes. Modifying the documentation took me several days, after which I went through the complete document once again while working in the application to identify inaccuracies and usability issues. I then prepared the document for its formal approval review.
Formal Approval Draft

I expected the formal approval process to be more streamlined than the previous reviews since most of the issues had been fleshed out in the earlier drafts. Therefore, before submitting the document to the SME’s, I first gave our Quality Assurance team the document to check for technical accuracy and usability. By this time, however, my deadline was rapidly approaching, and the Quality Assurance team was already quite busy. Unfortunately, I had to submit the final draft to the SME’s before I received feedback from the QA team. As expected, the SME’s did not have much input into the final draft. After they reviewed the document for one last time, I made the minimal changes to the documentation and then had the document thoroughly edited. After a day’s worth of in-depth editing, I once again made the changes to the document and prepared for production.

Phase 4: Production

Before I had started with the company, Synchrony decided it was to distribute all documentation via Adobe Acrobat PDF files available on both CD and from within the application itself. Furthermore, PDF files allow us to send the documents directly to the clients through e-mail when they request them. Therefore, the first step for production was to distill the documentation to PDF format. After distilling the user guide, I printed it out to check the hard-copy quality. I noticed that some of the images were hazy or had converted poorly. I then went back and modified the images accordingly, inserted them back into the document, and distilled it once again. After updating the document, I printed the document out again to check for errors. Once the document printed correctly, I sent the PDF file on to the product manager responsible for packaging the documentation with the application. (See Appendix B for the complete final copy of the RTM User’s Guide.)
**Phase 5: Evaluation**

After putting the documentation into production, I did not have time to perform a formal evaluation of the documentation due to additional work I had to tend to. Instead, we started gathering feedback from customers on issues they identified with the documentation. At the time of this report, I have been developing a running list of issues received from external customers, as well as internal users, and plan to include the changes in the next release of the documentation planned for the end of December. Most of the issues, however, deal with providing more information. The information customers want is more complicated and is more along the lines of an advanced user guide. In talking with senior managers, they feel that the guide is a success, and want me to move forward with an advanced guide.

**Percentages of Work**

In following the five-phase model, I had planned following the guidelines Hackos lists for the percentage of time (for the total project) to spend on each of the phases. However, the actual percentages of time I spent on each phase varied greatly from the time that she recommends. The following table shows the project percentage (as defined by Hackos) of time I planned to spend on each phase, the actual percentage I spent on each phase, and by how much the two percentages differ:

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<th>Actual</th>
<th>Difference</th>
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<td>5%</td>
<td>-5%</td>
</tr>
<tr>
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<td>5%</td>
<td>-15%</td>
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<tr>
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<td>85%</td>
<td>+35%</td>
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<tr>
<td>Phase 5: Evaluation</td>
<td>1%</td>
<td>1%</td>
<td>0</td>
</tr>
</tbody>
</table>
Looking at the differences between what I planned to do and what I actually did, I spent much more time on the Implementation phase than any other. The only phase that I spent the planned amount of time on was the Evaluation, while I spent less time that planned on the remaining phases. I believe that there are two main reasons for the above discrepancies: 1) very complicated and robust software and 2) no formal development process.

The software was difficult for me to learn, compared to other applications, due to its complexity. This increased learning curved took away from the time I had to develop the document in that it shortened the actual time I had to develop the documentation since I spent a large amount of time actually learning the product instead of writing. Furthermore, since the Reporting tool was so complicated, the processes and steps that users need to perform, which I was documenting, were equally as complicated, which are much more difficult to document. Also, the fact that the software was very robust, providing an incredible amount of features and functionality, required a greater amount of time to create the documentation.

Synchrony was not use to following a formal development process for their documentation. While I worked to change this, the managers had already determined the deadline for the Reporting documentation before I even started. Since they were uncertain of what work should be done, they chose a deadline that fit well with the release of the software. No one had put much effort into what it would take to develop the documentation; instead, the managers figured that they would set a date and get the documentation done by the date by whatever means.

Having gone through this process within Synchrony now, I feel that I will be able to come closer to spending the percentages of time on each phase as Hackos lists it. Now everyone who works with the Information Development team understands what is included in producing a document and how long it can take. While I don’t expect to be able to hit Hackos’ percentages exactly, I do expect to come closer to them than I did with the Reporting documentation.
CHAPTER FOUR

USING THE FIVE-PHASE PUBLICATIONS-DEVELOPMENT MODEL

Since I was introduced to it in the MTSC program, I have always used the five-phase publications-development model, or variation thereof, from JoAnn Hackos’ book, *Managing Your Documentation Projects*. This book was one of the textbooks used in the MTSC program, and it has provided me with an abundance of useful information that I have used since in my professional work.

When I began working at Synchrony, I had repeatedly used this model in my previous job, and I planned on using it at Synchrony as well. The major advantage of using this model is that it, or a similar model (for example the PDCA model), is widely accepted in the business world. Furthermore, the model has repeatedly helped me to produce solid, high-quality deliverables. When starting to develop documentation for Synchrony, I found they had a loose model similar to the five-phase model in place, but it was not quite as complete nor was it always followed. The Hackos model helped me provide more structure to my documentation development and played a large role in helping me develop our standard methodologies.

While using the five-phase model was very helpful, I found there were some disadvantages to using it. The largest disadvantage was trying to use the model under extremely aggressive deadlines. For example, my first document was extremely large, and I should have been assigned double the time I had to develop the product. When I started developing the documentation, I quickly realized that I would not be able to implement all five phases effectively. This constraint concerned me because I was worried about developing a document that did not meet my personal standards. Furthermore, all of the processes were not in place to support all aspects of the model, which complicated following the model that much more. In the
end, I was not able to follow the model exactly, but using it did bring to my attention internal processes that we needed to take a closer look at in order to ensure high-quality documentation. Furthermore, I still referred to the model regularly while developing my documentation. In doing so, I was able to identify potential risks that could potentially affect the final deliverable. In identifying these risks, I was able to communicate potential issues with the documentation to management before I delivered the documentation. This allowed us to prepare for items we could not fix in time, as well as overcome issues that would have otherwise gone unnoticed.

Another problem I had in using the five-phase model was that it had the steps specifically broken out and defined. Being clearly defined was not a problem unto itself; however, I found it difficult to keep track of multiple chapters in various phases of the five-phase model. For the majority of the work, I often had to perform phases concurrently. I was never able to follow the entire model all the way through for the entire manual. Instead, I would generally need to start on a chapter, and sometimes a section of a chapter, using the model as my guide. Then, as I began developing new sections and chapters, I would start at the beginning of the five-phase approach while I continued on other phases with other chapters that were much farther along. At times, taking this approach did cause some difficulty, such as when I changed a procedure in the sections I was currently working in but did not change the same procedure in other chapters that were farther along (for example, waiting for review or waiting for production). Also, I found I would be starting some chapters, wrapping up the first draft of others and sending them out for reviews, and getting some back from my SME’s with all their marked-up comments and corrections. With such a large document, keeping tabs on all the individual pieces was trying. When at all possible though, I tried to hold the finished chapters for review until I could get the remaining chapters finished so that I could submit them all as a complete manual. I was not always able to do this, but I did insist that the final review be done as a complete document and received little resistance from managers. Of course, I had to wait until I completed all the chapters
and assembled the final document before I could send it off for production. While different chapters were usually at a different phase of the Hackos model, the five-phase model did help me ensure more complete and concise content, once I got use to managing the documentation in this way.

At the time of this report, I am currently working on putting processes into place to better support this model. For example, everyone now has specific deadlines and milestones relating to each of the five phases, as well as less critical milestones relating to tasks within each of the phases. I then manage all of the deadlines, completion of work, and adjustments to our timeline within a project plan. I have shared the model with management and the rest of my team, some of whom are already familiar with Hackos and her book, and everyone agrees that this model will improve our documentation. While everyone likes the idea of using the model, though I doubt we will have it, or any variation of the model, in place any time soon. For the most part, Synchrony’s managers do not like formal processes and methodologies as a whole. The reason behind this, I believe, is due the way in which we develop our software. For example, for each release of the application, there are certain features and functionalities that take precedence over others. Our developers’ backgrounds, however, are not always geared towards focusing on a specific release. If a specific team, who normally focuses on a specific piece of the application, does not have enough people to get the work done, developers and programmers are pulled from different teams to fill in the gaps. With these new team members, who have a different background, following a methodology or process new to them may cut into development time, which could be detrimental. Instead, they have the programmers work in a way based loosely on industry standards and methodologies, and then one or two people pull all the code together and check for consistency and correctness. When in a real pinch, Synchrony will occasionally bring on contractors as well to fill the resource gaps. Once again, we do not want to pay the people to learn a specific methodology since it would cost us additional time and money, and the contractors may be
working for us only for the short-term. The key concept, as Synchrony sees it, is flexibility and speed. Of course, in order to make this concept work we do need several exceptionally strong individuals to pull it all together, as well as a superb Quality Assurance team, and luckily we do have this combination.

While I agree with this approach somewhat, I don’t think that it effectively applies to documentation efforts since the methodologies are not that extensive to begin with. Furthermore, the Information Development team does not have an expert editor dedicated to pulling all of the documentation together and checking for errors and consistency; instead, the individual writer is responsible for all of editing. The Quality Assurance team could review our documentation and provide feedback on overall usability and technical correctness of the manuals; however, it is already overworked and does not have the time to take on the additional responsibilities of handling documentation quality. I have shared these thoughts with my Vice President, and he agrees wholeheartedly. As he points out, however, the company is not used to such structured work, and it will take time to change the way people think.

When we do move forward with developing a methodology, we will inevitably have to modify the model in order to better meet our short timeframes and limited staff. In order to ensure quality while using the model, we will have to develop some creative solutions for certain phases. While I feel implementing the methodology is a good thing, I am curious as to how much it will improve our documentation and product as a whole. Nonetheless, I am hopeful.
CHAPTER FIVE

LESSONS LEARNED

I have really enjoyed my internship at Synchrony and look forward to future challenges and successes here. Since I am a part-time MTSC student working full-time as a technical writer and trainer while taking classes, I first thought that the internship phase may not be as beneficial for me as it would be for a full-time, non-working student. As soon as I started keeping a journal to track my progress and daily happenings, though, I was forced to reflect upon my work. This reflection really made me examine what I was doing, how I was doing it, and how my studies in the MTSC program affected my work. While I was taking classes and working full-time, I knew I would implement what I learned in class in my current work; however, I was so busy between work and school that I seldom took time to really think about much of it in-depth. I never really saw much of a transition between what I had learned in the MTSC program and what I was trying to apply in my work, until the internship stage.

In looking at my work and how the knowledge I gained from the MTSC program affected it, I learned two key lessons. First, it was clear to me that the MTSC courses had provided me with a strong foundation on which to build my work. The writing, editing, and communication skills I gained from the MTSC program were irreplaceable, and I could not have performed to the level at which I did without them. In my job, I definitely felt confident in my abilities and, more importantly, knew how to thoroughly provide meaningful reasons for why things should or should not be done a certain way. This knowledge was essential when I was working with people who did not fully understand what it was I did and how I was providing value (for example, why the documentation had to be so thorough, or why I had to learn more about the audience).

The second thing I learned was that I was not guaranteed a smooth transition between what I had learned in my MTSC courses and what I was doing at Synchrony. Specifically,
Synchrony was not particularly familiar, or comfortable, with some of the things I had learned in the MTSC program that I wanted to implement in my work. In my three previous jobs, I had worked in two companies that were primarily staffed by technical writing and training contractors and consultants, both of which employed five or more former MTSC students. In these previous jobs, I was working with people who held similar views to mine when it came to training and documentation. Synchrony, however, was comprised primarily of developers and programmers, and trainers and technical writers were very much the minority. The largely technical majority did not understand, for the most part, that there is a lot more to developing documentation and training than just getting behind the system and writing down what to do. The biggest transition between MTSC work and Synchrony was establishing documentation and training ground rules and processes, which had been the norm in my previous jobs. After establishing a solid and complete development methodology, Synchrony began to recognize the added value the Information Development team could bring and the additional work it required. Furthermore, my team had fewer situations where we had to skip “essential” steps; however, the team still had situations that required a “streamlined” process in order to meet goals and deadlines.

Looking at the projects I worked on during my internship, I would have to say that I would definitely do things differently knowing what I do now. I had worked with developers and programmers in the past, but it was in as a consultant on a team with other consultants. Working within a start-up software company was quite different than what I was use to. Specifically, I had never really had to learn so much so quickly, nor had I needed to work so closely with so many technical people on a regular basis. Now, I know that I need to get to know the developers quickly and keep up on how their work is coming. If I do not keep close to the developers, the software’s features and functionality, and consequently its timeline, can change within the course of a day. If I am out of the loop, my documentation and training deliverables can suffer.
Another aspect that was different in working for this type of company was that the up-down work cycles happened on an accelerated pace. In my previous jobs, my documentation and training workload would go from busy to slow over the course of a few months. At Synchrony, however, my workload would go from extremely busy to extremely slow within a single month. This situation was something new to me, and it took me a couple months to adjust. I found that, for me, the best way to take advantage of this time is to do as much planning, managerial, and research work as possible during the down times and then just focus on getting your core work done during the busy times.

As for my projects I did during my internship, I feel that they were all successful. I consider the Real-Time Monitor manual to be a very strong document, and the only work it has needed since I created it has been changes to reflect changes in the software itself. I do not consider the Reporting manual a strong document; however, I do consider it a success in that it does provide most users with the information they need, is of acceptable quality, and was completed under an unrealistic deadline. I think that we would have had to put an enormous amount of work into it in order to make it a perfect manual, but with the manual the way it is, we can more easily and effectively get customer feedback. The training that I created during my internship was a success: all of Synchrony’s customers were very impressed with the training classes and walked away feeling confident about their abilities to use our software. Finally, the e-learning and training plans were very successful in that they allowed senior management to see what work we really needed to do within the Information Development team, how it would improve our product and customer satisfaction, and what it would take to do this work. It also helped the management team see that the software alone is not the product we are selling, but that our product consists of the software, training, and documentation.

Concluding my internship, I stayed on at Synchrony while the company went through many changes, both in their software as well as their business operations. My vice president
considers me an essential member of the Information Development team, and I he has promoted me to the manager of the entire department. While the work here at Synchrony is trying, I love the work and the people. To date, this is by far my favorite job, and I hope to continue to be a valuable asset to the company.
APPENDICES

APPENDIX A: E-LEARNING PLAN
# eLearning Vision

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Synchrony eLearning Vision

Synchrony currently offers clients with instructor-led training courses to help educate clients’ agents on how to use our product. However, as our product and customers’ needs continue to expand, we will need to increase our training efforts in order to ensure that all agents can effectively use our product. One of the most effective ways to meet our customers’ needs, and to offer training support to an increasing number of agents, is through eLearning. At this time, we have only begun developing the eLearning program; however, we have a vision of where we think this program should be in a year from now.

This document provides critical information about the direction and development of the eLearning project for the Synchrony product over the next year. In this document, we identify what we currently see as the final eLearning product, the courses that it will include, as well as the features and functionalities of the site. Furthermore, we identify the type of skills we will need for developing the eLearning program, which helps us in identifying what types of skills we need to look for when hiring and outsourcing work.

For a more detailed look at the project, refer to the current quarter’s eLearning Project Plan, which will include a more granular level of detail and more specific dates, features, and functionality, as well as specific needs, exclusions, and roles and responsibilities for that phase of the project. The eLearning Vision document is designed for a high-level guide only to help steer the overall project.
In developing the eLearning site and courses, we plan to use two essential strategies in guiding our efforts: a Learner-Based Model and a Phased Approach. Each strategy is discussed in more detail below.

**Learner-Based Model**

Not everyone learns the same way. Some people can sit in a lecture and absorb everything the speaker says, while others need to actually do something themselves before they learn it. Most people tend to be predominantly one type of learner. Even though learners have preferred styles, they can often adapt to another style. The style that a learner prefers is determined by the style that is used when the learner experiences success. The learner tends to look for that particular style in each learning experience (usually subconsciously).

Since our eLearning courses will be designed for a very wide audience, we will inevitably have multiple learning styles we need to accommodate. Therefore, we will need to vary our training methods throughout the courses to accommodate all types of learners. The eLearning courses will need to be based on our audience’s learning styles. The following table includes the three basic learning styles that we will accommodate in our eLearning program.

<table>
<thead>
<tr>
<th>Learning Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auditory Learner</td>
<td>The <em>auditory learner</em> processes new information best when the information is spoken. A lecture is a successful technique. You might not need to use any props or aids to help auditory learners make the connection between the information you are speaking and the way learners will use the information. Auditory learners might make the connection as quickly as you speak.</td>
</tr>
<tr>
<td>Visual Learner</td>
<td>The <em>visual learner</em> processes new information best when the information is demonstrated or illustrated. Instructor demonstrations, role-playing, and drawing pictures are successful techniques.</td>
</tr>
<tr>
<td>Kinesthetic Learner</td>
<td>The <em>kinesthetic learner</em> processes new information best when the information can be touched or manipulated. Keying the steps to create something, taking notes, examining items, and participating in activities are successful techniques.</td>
</tr>
</tbody>
</table>

In accommodating these learning styles, we will implement specific mechanisms and tools based on the learning styles. Some of these mechanisms include Show Me movies for the Visual Learner, Try It simulations for the Kinesthetic Learner, and Voice-Over Audio for Auditory Learners. We will include the specific tools and functionality in the individual quarterly plans.
**Phased Approach**

The Phased Approach we are taking is that we plan to implement new features, functionality, and courses on a quarterly basis.

This quarterly based approach provides with several benefits:

- Clearly defined due dates
- Ability to update the site with major features and functionalities, versus ongoing minor changes
- A specific eLearning product for each Quarter, which can be tested as a whole before release
- A reasonable timeframe to retool our staff as necessary
- The ability to more readily adapt to changes and additions in the Synchrony product and eLearning curriculum as they arise

For more information on which features and functionalities will be released in each quarter, refer to the *Timeline* section.
The following flowchart shows a high-level view of the site as we see it in Q4, 2001. The pages following this flowchart describe each part of the site, as well as features and functionalities.
1 – Client Services

The Client Services page is located off of the main Synchrony site, and is designed for Synchrony clients to use to obtain information specific to their needs. Marketing developed this page, and other subsequent pages, for our clients to provide them with updates to documentation, account support, and technical support; however, this section works well as a gateway for eLearning also since eLearning is applicable to only our clients.

Design
For information on the design of the Client Services page, contact the Marketing Department.

Navigation
From the Clients Services page, clients have to login to have access to the subsequent extranet pages. The Login page and eLearning page is discussed in more detail below. For more information on the navigation of the Client Services page, contact the Marketing Department.

Technical
For information on the technical requirements of the Client Services page, contact the Marketing Department.

2 – Login Page

The Login page is designed to allow only approved clients to log into the Client Services extranet. We will, however, also provide students with specific logins so that they can use our eLearning site and courses.

Design
For information on the design of the Login page, contact the Marketing Department.

Navigation
The basic navigation for the Login page allows clients to enter the Client Services extranet. For more information on the navigation of the Login page, contact the Marketing Department.

Technical
The Login page will need to include security features that allow only those students with proper ID’s and Passwords to enter the eLearning site. Furthermore, it will need to have the capability to distinguish between different types of users in order to display the appropriate Student Resources/Welcome page (see below). (For
more information on displaying the appropriate Welcome page, refer to the Student Welcome page and Student Tracking sections below.)

3 – Training & eLearning Home Page

The Training & eLearning page is the main training page off of the Synchrony website. This page will provide customers with:

- Information on our current training programs and eLearning classes offered
- E-mail and phone contacts to answer training questions
- A link to the actual Training & eLearning site for current customers who have signed up for training and/or eLearning classes

Design

The overall design of this page will be similar to the rest of the Client Services extranet; however, it will vary somewhat in order to denote a change in direction. We want to ensure that we still have the “Synchrony” feel to the Training home page, but we also need it to look different enough that users can tell that this page serves a separate purpose than the rest of the site. The User Interface should be a combination between the Synchrony site and the eLearning Site, since this is the “Gateway” to the eLearning Site.

Navigation

From this page, customers and students have the option to either enter the eLearning site via a link, or to return to the main Synchrony site via the top frame, which includes the major areas of the website. From the Training & eLearning Home page, students have the option to go to the following pages:

- Student Welcome Page
- Course Lists & Overviews
- Online Registration

Technical

The eLearning home page’s architecture/coding will be similar to that of the rest of the site, and should fit seamlessly into the overall Synchrony web site.

3A – Course Lists & Overviews

The Course Lists & Overviews page provides students with a complete list of all classes available to them and online registration for those classes. We plan to eventually develop this page in a way that allows students to see only those courses that are applicable to them; however, we will not be able to do this immediately
and will provide a complete listing of classes grouped by audience (agent, supervisor, etc.). This page will include:

- List of Web-Based Training, Distance Learning, and Instructor-Led classes offered.
- An overview of each course, explaining what is covered and the objectives of each class

**Design**

The Course Lists & Overviews page will use the basic eLearning UI.

**Navigation**

From the Course Lists & Overviews page, students have the option to go to the following pages:

- Training & eLearning Home Page
- Online Registration
- Student Welcome Page

**Technical**

This page will need to have the capability to draw from the audience-specific database in order to display the applicable classes for each student.

### 3B – Online Registration

The *Online Registration* page allows students to sign up for specific classes online. Students will need to use a credit card or a client’s account number in order to sign up for a class.

**Design**

The Online Registration page will use the basic eLearning UI.

**Navigation**

From the Online Registration page, students have the option to go to the following pages:

- Training & eLearning Home Page
- Course Lists & Overviews
- Student Welcome Page

**Technical**

This page will need to have the capability to handle online transactions.
4 – Student Welcome Page

The Student Welcome page is the first page that students come to that is customized for the individual. The main purpose of this page is to provide students with information and resources that are useful to the specific individual. The information this page displays will be developed from both audience-specific data and individual-specific data. For the audience-specific data, we will have developed a profile for each type of user (agent, supervisor, analyst, etc.) that includes the type of resources and classes those individual will find helpful. For the individual-specific data, we will have developed a database that includes information on each student, including what classes the student has already taken and how s/he performed in those classes. By putting the audience-specific and individual-specific information together, we can provide the student with information and resources that will be most helpful to him/her. This keeps the student from having to dig through all the possible resources and classes to figure out what is applicable to him/her.

The main Student Resources page is a summary of all of the student’s information, allowing the student to get a big-picture of where s/he stands. For more specific information, the student can drill-down to the specific pages (detailed in the following section). The Student Resources page will provide students with:

- Summary of the student’s performance and classes taken
- Latest Assessment/Test results
- Reminders for upcoming classes
- Product recommendations to extend or support training (additional WBT classes, instructor led courses, job aids, user manuals, etc.) based on test scores, uncompleted classes, and new features/functionality

Students will have access to the Student Welcome page only if they logged into the Client Services extranet with a student-specific ID and Password. If they use a generic client login, they will not have access to this page. They will need to have registered for a class first.

Design
The Student Resources page will use the basic eLearning UI.

Navigation
From the Student Resources page, students will have the option to go to the following pages:

- Student Records
- eLearning Knowledge Base
- eLearning & Technical Assistance
- Web-Based Training
- Distance Learning
- Instructor-Led Courses
- eLearning Portal Help System

**Technical**
This page will need to have the capability to draw from the audience-specific and student-specific databases in order to display customized information to each student. Furthermore, we must have an infrastructure that keeps those without the proper login ID and Password from seeing this page.

**4A – Student Records**
The *Student Records* page will provide, for each student, a detailed record including:

- Classes Completed
- Assessment/Test Scores
- Overall Skills Assessment, including:
  - Ranking/Performance
  - Strengths
  - Weaknesses/Areas of Improvement
- Recommended classes

**Design**
The Student Records page will use the basic eLearning UI.

**Navigation**
From the Student Records page, students will have the option to go to the following pages:

- Student Welcome Page
- eLearning Knowledge Base
- eLearning & Technical Assistance
- eLearning Portal Help System

**Technical**
This page will need to have the capability to draw from the audience-specific and student-specific databases in order to display customized information to each student.
The eLearning Knowledge Base page is designed to offer students a set of gathered information for specific topics. The knowledge base presented to the students is built upon students’ questions (gathered from both online and trainer-led courses). This allows the students to look for helpful information on their own instead of having to contact a support person. Furthermore, this eLearning Knowledge Base is developed in our Synchrony Application, so that our support personnel can use, and we can make the same knowledge available to the students. This page is the gateway to the knowledge base itself.

Design
The eLearning Knowledge Base page will use the basic eLearning UI, but it will be slightly modified to allow for search capabilities and more in-depth drill-downs. We may incorporate parts of our Synchrony KM UI into the eLearning Knowledge Base UI.

Navigation
From the eLearning Knowledge Base page, students have the option to go to the following pages:
- Student Welcome Page
- Student Records
- eLearning & Technical Assistance
- eLearning Portal Help System

Technical
The eLearning Knowledge Base page will need to include a search engine as well as a Knowledge Base architecture built for subsequent pages within the knowledge base itself.

The eLearning & Technical Assistance page is designed to provide students with help for the classes and for the technical requirements for the site. It will also provide an explanation/overview of the real-time eLearning Assistance that is available while working in the WBT courses. This page will provide students with:
- Specified times assistance is available (24/7 vs. 9-5)
- Duration of available support (only during training, before, after, or unlimited access)
- eLearning Assistance:
- Overview of real-time eLearning assistance
- Email and phone contacts for eLearning assistance
- Chat option for eLearning assistance
- Means to assist students in course selections

**Technical Assistance:**
- Technology requirements users’ computers and network must meet in order to effectively use the eLearning courses
- Minimal system configuration documentation so that the client’s IT staff can ensure the computers and system are set up correctly
- Email and phone contacts for technical assistance

The eLearning & Technical Assistance we offer is based on the Synchrony Application itself. We plan to use a Training & eLearning Campaign to help track and manage all the information on our students and customers as it relates to eLearning and Training.

**Design**

The eLearning & Technical Assistance page will use the basic eLearning UI.

**Navigation**

From the eLearning & Technical Assistance page, students have the option to go to the following pages:
- Student Welcome Page
- Student Records
- eLearning Knowledge Base
- eLearning Portal Help System

**Technical**

The eLearning & Technical Assistance page will need to have the capability to allow students to talk with a live agent, or include a link to a live-chat eLearning Assistance page, as well as the capabilities to send emails our call and agent.

---

**5 – Web-Based Training**

The main page for Web-Based Training is designed to allow students begin their WBT classes. It will provide students with:
- A list of all the classes they are currently registered to take, including a link for each course to begin taking the class
A description/bookmark of where they left off if they did not complete a course/module, including a link to pickup where they left off

**Design**

The Web-Based Training page will use the basic eLearning site UI.

**Navigation**

From the Web-Based Training page, students will have the following options:

- Start a training course
- Continue a training course
- Return to the Student Resources page

**Technical**

This page will need the capability to display information pertaining to the classes the individual student is signed up to take, as well as where s/he left off within any classes s/he has not completed.

### 5A1 – Overview

Each course will begin by providing the following information:

- **Overview** – Provides general information on the course itself, including prerequisites and intended audience
- **Outline** – Lays out the entire course, including modules, topics, and exercises/tests, as well as estimated time frames for each module or topic
- **Objectives** – Provides a specific set of skills the students should acquire from the course

### 5A2 – Pre-Test/Audience Analysis

The Pre-Test/Audience Analysis page allows us to ensure that the student has met certain pre-requisites in order to take the specific class, as well as gather information on our audience/students that we can use to improve our training courses. It will include questions to test students’ knowledge about the topic at hand and topics they need to understand in order to take this class. It will also include audience analysis questions, such as their work environment, familiarity with technology as a whole, education, learning styles, etc.

### 5A3 – Modules

Each course will be broken down into specific modules. This allows us to break the courses into a format that helps keep the training as short as possible. If a student
wanted to, for example, s/he could decide to finish a module a day for a specific course. This would allow the student to keep from having to sit through a long course behind the computer. Furthermore, it allows us to specify which modules within a course are pertinent to which audiences, which allows students to learn what in applicable only to them.

Each module will include:

- Overview
- Core Pages
- Evaluations
- Results & Options

**5A3a – Module Overview**

Each module will begin by providing the following information:

- Overview – Provides general information on the module, including prerequisites and the intended audience
- Outline – Lays out the specific module, including topics and exercises/tests, as well as estimated time frames for each topic
- Objectives – Provides a specific set of skills the students should acquire from the module

The Outline and Objectives will be a more in-depth view taken from the overall course Outline and Objectives.

**5A3b – Module Core Pages**

The module core pages are the actual instruction information of the course. These pages will provide students with overview and conceptual information on Synchrony tools, features, and functionality, as well as information on how to perform specific tasks. The core pages will include textual and graphical information only, but will provide, when applicable, links to:

- Model/Show Me movies
- Interactive/Try It simulations
- Story Line/Case Study descriptions
- Printouts
- eLearning Assistance

For more information on the above links, refer to the appropriate sections 5B through 5F below.

**5A3c – Module Evaluations**

At the end of modules, and sometimes at the end of topics when the module is large enough, we will provide a variety of assessments and tests. These tests will include:

- Non-graded practice tests
- Graded tests to track progress
Multiple Choice
Simulations

5A3d Module Results & Options
A Module Results & Options page will be at the end of each module, and will provide students with a status of which module(s) they have completed and which modules they have left to complete in the course, and how they performed on the evaluations within the last module they took. This page will also provide students with the options to review any of the material, re-take any of the tests, to move on to the next module, or to quit the course with the intention of coming back to it later.

5A4 – Course Evaluation
At the end of course, we will provide a final assessment to test the students’ overall retention and performance. These will include combination of:
- Multiple Choice
- Simulations

5A5 – Results & Options
A Course Results & Options page will be at the end of each course, and will provide students with a status of how they performed on the module tests and the final course test. This page will also provide students with the options to review any of the material, re-take any of the tests, or to return to the Student Welcome page.

5B – Model/Show Me
Model/Show Me pages provide students with the option to see how to perform a task via a shockwave/flash movie. These movies will not be included in the core pages themselves. Instead, the core pages will contain a link to the applicable Model/Show Me movie (when available). When the student selects this link, the movie will open in a Secondary window. In the secondary window, the student has the options to view the movie again or to close the movie. If the student selects another link on the core page, however, the secondary window will close. Currently, the movies are visual only, but may eventually include sound.

5C – Interactive/Try It
Interactive/Try It pages provide students with the option to try to perform a task within the training program. It is similar to the Show Me movies, but it differs in that the user actually performs the tasks instead of watching the movie show them how the tasks are performed.
Like the Show Me movies, these simulations will not be included in the core pages themselves. Instead, the core pages will contain a link to the applicable Try It simulation. When the student selects this link, the simulation will open in a Secondary window. In the secondary window, the student has the options to try the simulation or to close the window. If the student selects another link on the core page, however, the secondary window will close.

5D – Story Line/Case Studies

Some students find it particularly helpful if tasks, or How To descriptions, go along with a case study or story line. We will provide a story line that parallels the core pages. If a student would like to see how this feature/functionality relates to real-life, s/he can click on the Story Line link to bring a real-life example up in a secondary window.

Like the Show Me movies, these Story Line pages will not be included in the core pages themselves. Instead, the core pages will contain a link to the applicable Story Line, if available. When the student selects this link, the Story Line will open in the secondary window. It will consist of primarily text and graphics, but may include shockwave/flash movies where applicable. When open, the student.

5E – Printouts

Printout pages will provide students with the option to print instructional guides that allows them to perform the work on their own system or job aids that will help them in performing the tasks covered on the current page.

Like the Show Me movies, these pages will not be included in the core pages themselves. Instead, the core pages will contain a link to the applicable Printout Lists, if available. When the student selects this link, a list of printouts will appear in a secondary window. The students can then print the desired documentation/job aids or close the window. If the student selects another link on the core page, however, the secondary window will close.

5F – eLearning Assistance

In order to ensure that our eLearning classes run smoothly, we will provide our students with various forms of eLearning assistance. Inevitably, we will not be able to foresee all student questions that may come up and, therefore, cannot provide all possible answers within the course itself. Also, there may be technical issues/questions, or client-specific question, that arise that are not appropriate to include in the course material itself, but that the student still needs help with. We plan to provide students with the following forms of assistance:

- Mentor Support
  - One-to-one support via email, telephone, and chat that puts the student in access with Synchrony’s support desk
  - Available via link from course pages
- Provides support for content questions, helps learners apply course material to a specific job, and provides real-time coaching
- Response time. Responses to questions can range from hours to days. Beware of vendors that don't have response-time requirements.

- Help system that includes:
  - Context Sensitive Help – Provides information relevant to the specific page the student currently has up
  - Synchrony Help – Provides information on the Synchrony product itself
- Glossary – A list of common Synchrony terms

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### 6 – Distance Learning Real-Time Classes

Synchrony will offer some Distance Learning Real-Time classes for a specific set of classes. In particular, we will offer these Distance Learning classes when a topic is too complicated to convey through WBT or when an Instructor-Led class is needed but logistic problems exist. The Distance Learning classes will include the following sections/features:

- Overview
- Class Preparation
- Course Materials
- Online Class Participation
- Post-Class Studies/Exercises
- Course Evaluation
- Course Results & Options
- Online Group Collaboration

---

### 6A1 – Course Overview

Each Distance Learning course will begin by providing the following information:

- Overview – Provides general information on the course itself, including prerequisites and intended audience
- Outline – Lays out the entire course, including modules, topics, and exercises/tests, as well as estimated time frames for each module or topic
- Objectives – Provides a specific set of skills the students should acquire from the course
**6A2 – Pre-Test/Audience Analysis**

The Pre-Test/Audience Analysis page allows us to ensure that the student has met certain pre-requisites in order to take the specific class, as well as gather information on our audience/students that we can use to improve our training courses. It will include questions to test students’ knowledge about the topic at hand and topics they need to understand in order to take this class. It will also include audience analysis questions, such as their work environment, familiarity with technology as a whole, education, learning styles, etc.

**6A3 – Class Preparation**

The Class Preparation page will include information detailing what the students need to do in order to prepare for the class. It will include technical information specifying how their computers and systems must be set up in order to participate in the class, as well as any hard-copy course materials they will need.

**6A4 – Course Materials**

For some of the Distance Learning classes, we will need to provide the students with hard-copy documentation for them to refer to during the class. Since we will need all of the screen space for the Distance Learning UI, it is best that the students still have access to some of the relevant information in hard-copy form.

**6A5 – Online Class Participation**

The Online Class Participation portion is the core instructional piece of the Distance Learning classes. The instructor will train the students via the Distance Learning UI, which will include:

- **Real-Time Control Capabilities** – Allows the instructor to control the system that is displaying so that the students can see how to perform a task
- **Text/Graphics Area** – Allows the Instructor to display textual content, screen shots, and/or diagrams to the students
- **One-Way Voice Capability** – Allows the instructor to speak to all of the students while training (instructor can speak to students, but students cannot speak to the instructor)
- **Chat/Question Area** – Allows students to post questions to an instructor and receive answers in real-time

**6A6 – Post-Class Studies/Exercises**

For some of the classes, it may be beneficial for the students to perform exercises or study additional information offline. This allows the student to go at his/her own pace and helps to minimize the length of time the Distance Learning class runs.
6A7 – Course Evaluation

We will provide a variety of online evaluations and tests throughout the course, as well as a final test at the end of it. These tests will include:

- Non-graded practice tests
- Graded tests to track progress
- Multiple Choice
- Simulations

6A8 – Course Results & Options

A Course Results & Options page will be at the end of each course, and will provide students with a status of the topics they have completed and how they performed on the evaluations within course. This page will also provide students with the options to review any of the material or re-take any of the tests.

6B – Online Group Collaboration

We will provide students with the ability for Online Group Collaboration throughout the class. This will allow the instructor to let students work as a team when solving problems. The two types of group collaboration we will offer include:

- Moderated discussion groups. Where students and instructors can collaborate on course-related materials or assignments.
- Real-time synchronous chat. Allows learners to communicate with their peers and instructors.

7 – Instructor Led Classes

While instructor-led classes are not the primary purpose of the eLearning & Training site, the site does allow us to strengthen the current instructor-led classes. We can offer access to this section to students who are registered for instructor-led classes to help them prepare for the class. We will include two main sections under Instructor-Led Classes:

- Class Preparation
- Class Materials
7A1 – Class Preparation

This section will include information to help the students prepare for the class. It will include information on prerequisites and intended audience, as well as any documentation they might need for the class. Furthermore, we can include small exercises or overview/introductory material in order to minimize the actual length of the class itself. We can also include and outline that lays out the entire course, including topics and activities, as well as estimated time frames for each topic, so that students know what to expect. Furthermore, we can provide course objectives so that students know set of skills they should acquire from the course.

7A2 – Class Materials

Is the Class Materials section, we will provide documentation that students need for the class. Depending on the class, we plan to provide:

- Student Guides
- Job Aids
- Class Handouts

8 – Student Tracking/Business Intelligence

Throughout the site, we will track where each student goes, how long s/he spends on a topic, and how well s/he performs on the exercises and test. We will use the data we collect to:

- Provide individuals with customized information when they logon to the eLearning site
- Measure the effectiveness of our courses and identify areas for improvement and modifications within each course

9 – eLearning Portal Help System

The eLearning Portal Help System will be available to all students from the time they log in. This help system provides information on using the eLearning Portal itself, but does not include information on the courses themselves. Instead, when a student begins a course, the help system will begin to include information that pertains to that class and the Synchrony product. When the student logs out of the course, then the help system will no longer include the course-specific help information. However, the helps system will include eLearning and Technical contact numbers and email addresses for support, as well as a link to the main eLearning & Technical Assistance page.
This section outlines when each feature, functionality, page, and/or course will be implemented.

**Q1 Features**

In Q1, 2001, we plan to implement the following:

- **Training & eLearning Home Page:**
  - Course Lists & Overviews
  - Online Registration
- **Student Welcome Page (basic)**
- **Web-Based Training:**
  - *Synchrony Desktop* course
  - Model/Show Movies
  - Interactive/Try It Simulations
  - eLearning Assistance with e-mail Mentor Support

**Q2 Features**

In Q2, 2001, we plan to implement the following:

- **Customized Student Welcome Page/Section, including:**
  - Audience-specific information
  - Individual-specific information
  - eLearning & Technical Page, with complete e-mail, chat, and phone functionality
- **Student Tracking/BI:**
  - Audience Profiling Capabilities
  - Tracked tests with results
  - Students’ actions tracked through entire site
- **eLearning Portal Help System**
- **Web-Based Training:**
  - *Knowledge Manager* course
  - *RTM* course
  - *BI Basics* course
  - Story Line/Case Study Descriptions
  - Printouts
• eLearning Assistance with complete e-mail, chat, and phone functionality
• Glossary

Q3 Features
In Q3, 2001, we plan to implement the following:
• Fully customized Student Welcome Page/Section:
  • Student Records
  • eLearning Knowledge Base
• Web-Based Training:
  • Advanced BI course
  • Partner course
  • Trainer Certification course
  • Course-specific, context sensitive online help

Q4 Features
In Q4, 2001, we plan to implement the following:
• Distance Learning Courses
• Instructor-Led Sections
The success of the eLearning project requires key members of the organization to play a role in its development:

<table>
<thead>
<tr>
<th>Role</th>
<th>Person</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>eLearning Course Developer</td>
<td>Dan Byrne, Bryan Sherman, &amp; Emma Young</td>
<td>Develop course content&lt;br&gt;Integrate UI and content</td>
</tr>
<tr>
<td>Subject Matter Experts</td>
<td>Synchrony Supervisors</td>
<td>Answer questions about users and the tasks they will perform</td>
</tr>
<tr>
<td>Technical Experts (Engineering)</td>
<td>Synchrony Engineers</td>
<td>Review course for technical accuracy and participate in walkthroughs as needed</td>
</tr>
<tr>
<td>Technical Experts (QA)</td>
<td>Synchrony QA Expert</td>
<td>Review Portal and course for technical accuracy and participate in walkthroughs as needed</td>
</tr>
<tr>
<td>Editor</td>
<td>Synchrony peer editor</td>
<td>Review the course for consistency, clarity, usability, and so on</td>
</tr>
<tr>
<td>UI Developer</td>
<td>Innersync Studios</td>
<td>Develop the initial user interface, with input from Course Developers, Project Manager, and other Synchrony employees</td>
</tr>
<tr>
<td>Flash Developer</td>
<td>Innersync Studios</td>
<td>Develop the initial Show Me movies and Try It simulations with input from Course Developers and Project Manager</td>
</tr>
<tr>
<td>Web Architect</td>
<td>Synchrony Programmer/Developer</td>
<td>Assist with technical issues, architecture, and support for portal and course development</td>
</tr>
<tr>
<td>Training Program Project Manager</td>
<td>Dan Byrne</td>
<td>Maintain development project plan, mitigate risks/problems, and general guide project</td>
</tr>
</tbody>
</table>
Guide to Using the Synchrony™

Real-Time Monitor
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RTM v3.2
About This Guide

This guide can be used as a learning aid and/or as a reference document. It is available online in PDF format within the Synchrony product.

Formatting Conventions

<table>
<thead>
<tr>
<th>FORMATTING CONVENTION</th>
<th>TYPE OF INFORMATION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Within an instruction or a procedure, the name of a menu, menu option, field, button, or other control that you will perform an action on or to.</td>
<td>On the <strong>File</strong> menu, click <strong>Exit</strong>.</td>
</tr>
<tr>
<td><em>Italics</em></td>
<td>Variable names, introduced terms</td>
<td>Create a child node under <strong>Classifications</strong>.</td>
</tr>
<tr>
<td>SMALL CAPS <strong>Courier</strong></td>
<td>Keys, key combinations</td>
<td>Click <strong>CTRL+P``</strong> to…</td>
</tr>
<tr>
<td><strong>Courier</strong></td>
<td>Text that you will be instructed to type exactly as it appears—for example, in a field or text box</td>
<td>Type <strong>ottoman</strong> in the title field.</td>
</tr>
</tbody>
</table>

Key

- **Note**
- **Tip**
- **Caution**
# Real-Time Monitor Overview

## What is Real-Time Monitor?

Synchrony’s Real-Time Monitor (RTM) is a reporting tool that allows supervisors to view interaction data and statistics as they occur. The Synchrony system gathers information on all interactions, including how agents handle them from the time the interaction begins to the time it is closed. By displaying the campaign’s interaction information in real time, the RTM allows supervisors to see how your company is handling customer interactions and to make decisions as changes actually happen.

## RTM Users

Campaign supervisors can use the RTM to help them manage their immediate needs. However, operations managers and analysts may occasionally use the RTM in order to get immediate information that they can use to compare against the information they gather from Synchrony’s other reporting tools.

## RTM vs. Reporting

While the RTM does provide features and benefits similar to Synchrony’s Business Intelligence (BI) solution, the RTM differs in several ways. Specifically, the RTM:

- Displays trends and results as they occur.
- Can display report data for the past 24 hours.
- Can display data in multiple formats (tables, graphs, etc.) and in multiple windows simultaneously.
- Refreshes data at a user-defined interval, ranging from 15 seconds to 20 minutes.

The BI solution, however, cannot perform the tasks listed above. On the Other hand, Synchrony’s BI solution is a much more powerful and robust tool, allowing the user to perform a more detailed analysis.
Using RTM

Using Synchrony’s RTM is a streamlined process consisting of four major steps:
- Opening RTM
- Viewing Reports
- Changing Report Views
- Changing Data Sets

The following general steps outline how to use the RTM:

The above steps are discussed in more detail in the following pages.
2 Opening RTM

To access the RTM, you need to log on to the Synchrony Desktop and select the RTM icon from the Resource Panel. The following general steps outline how to view reports:

To Open the RTM

To log on to the system, you need a user name, password and a computer connected to the Internet. Typically, the user name will be your email address (e.g. cjones@company.com).

If you are not logged in to Synchrony, follow steps 1 through 3. If you are already logged in to the system, then skip to step 4.

1. Double-click the Internet Explorer icon on the desktop. Internet Explorer opens.

2. Type "prod.gosynchrony.com" in the address bar of Internet Explorer.
The logon screen appears.

If the above screen appears, click **Yes** to accept the file. This can take a couple of minutes to download, but is a one-time process.

3. Type in your user name and password and click **OK**.  
   *If the user name and password are valid, the application loads.*

The user name and password are case-sensitive; therefore, if the user name is `cjones@company.com`, then `Cjones@company.com` will not be accepted.
By checking the **Save this password in your password list** box, Internet Explorer will remember your login id and password next time you logon. If you share the workstation with other users do not use this option.

*If the system is configured to receive phone calls, the Confirm Remote Number dialog box appears.*

4. If you can receive phone calls, verify that the correct phone number displays and click **OK**.  
   *If the number is incorrect, or you need to use a different number, change it and click OK.*

   > In most setups you will need to preface your phone number with a “9” as well as a "1" and the area code.

The Synchrony Desktop appears.


---

You will be able to see the RTM icon only if your user ID is configured for you to use the RTM. Otherwise, you will not have access to the RTM for that campaign.

You may be able to use the RTM for one campaign but not another, depending on how your user ID has been configured.

The Real-Time Monitor Report List is what you will use to access each of the reports. The following pages include information on each report and how to use reports.
3 Viewing Reports

RTM allows you to view reports in several ways and supplies you with multiple viewing features. The following general steps outline the Viewing Reports process:

**Determining Reports to Use**

Before you start working with the reports, you need to determine which reports will be most helpful in your case. Depending on what you are trying to ascertain from the RTM reports, different combinations of reports will be more helpful than others. (Refer to the *RTM Report Descriptions* section for more information on the individual reports.)
Opening Reports

When opening reports, you have the option to view a single report or multiple reports simultaneously.

To Open a Report

1. Select the report you want to view.

   OR

2. Click View.
- Double-click the report you want to view.
  The Report Window appears in the RTM Workspace.

To Open Multiple Reports
1. Press and hold the CTRL key.
2. Select the desired reports with the mouse.
3. Release the CTRL key.
4. Click **View**.

Refer to the *Managing Report Windows* section, as follows, for information on opening additional reports while other reports are already open.
Managing Report Windows

The RTM Windows Toolbar located at the bottom of the RTM workspace allows you to manage your report windows once you have them open. The RTM Windows Toolbar provides a means to open, close, refresh and layer report windows in the RTM workspace.

- **Cascade Button**
  The Cascade button layers the windows in a diagonal, overlapping manner.

- **Tile Button**
  The Tile button places any open windows in a side-by-side manner, filling up the screen.
**Refresh Button**
The Refresh button updates all of the information in all open reports, whether in table or graph views.

**Refresh Rate Pull-Down**
The Refresh Rate pull-down menu allows you to select a timeframe for the report information to automatically update. You can choose rates ranging from 15 seconds up to 20 minutes, or you can turn it off.

**View Button**
The View button opens the select window(s) for the selected report(s).

**Select New Button**
The Select New button takes you back to the main RTM Reports window.

If you click the Select New button without closing any open report window, those windows will remain open until you close them.

**To Refresh RTM Report Data**
1. Open the report(s) you want to view.
2. Click Refresh to update the data instantly.
   **OR**
2. Select a refresh rate from the Refresh Rate Pull-Down to have the data refresh every XX seconds/minutes.

**To Select a New Report**
1. Click Select New.  
   *The Main RTM Report List appears.*
2. Open the desired report from the Report List.  
   *The report opens along with the previously opened reports.*
4 Changing Report Views

RTM allows you to manipulate the way in which it presents the report information through changing the report views. The following general steps outline the Changing Report Views process:

- Use the Report Toolbar
- Select Display Columns
Using the Report Toolbar

The Report Toolbar controls the specific views for each report in the workspace and allows you to manipulate the way in which you view the data. From the RTM Report Toolbar, you can view each report in multiple formats, depending upon your needs. You can view the reports in table, bar graph, line graph or pie graph views. Also, you can change the campaign you are viewing from the window you have up and/or change the interaction type. Each feature is discussed in more detail below.

Table View
The Table View is the default view for each report. The data is in a table format, but the columns in the Table View differ between the different reports.

Bar Graph View
The Bar Graph View is useful in showing comparisons among quantities of information. You can choose multiple columns from the Table View in order to modify the bar graph.

Line Graph View
The Line Graph View is another format that is useful in showing comparisons among quantities of information. You can choose multiple columns from the Table View in order to modify the line graph.
Pie Graph View
The Pie Graph View is best used to portray percentages of proportions. You can choose multiple columns from the Table View in order to modify the pie graph.

Campaign Pull-Down
The Campaign pull-down menu allows you to quickly display data from another campaign, but through the same view and report you are currently in.

Interaction Type Pull-Down
The Interaction Type pull-down menu allows you to quickly display data from another interaction within the same campaign, but through the same view and report you are currently in.

To Change the Report View
1. Click the desired View button.
   The table view or bar, line, or pie graph view appears, depending on your selection.

2. (Optional) Select the desired campaign from the Campaign pull-down menu.
   The report window repopulates with data from the selected campaign.

3. (Optional) Select the desired interaction type from the Interaction Type pull-down menu.
   The report window repopulates with data from the selected interaction type.
Selecting Display Columns

When displaying information in graph form, RTM allows you to specify which columns you want to display. Some reports do not have selectable columns for displaying, or they have only one column that will display. These reports have all of their columns grayed out.

Reports that do have columns you can select to display have their selectable columns in white.

To Display Selectable Columns

1. Select each column you want to display.
   *The column is highlighted in green when you select it.*

   📌 To select multiple columns to display, hold the CTRL key while clicking on the columns.

2. Click the desired View button.
   *The columns you selected display in the specified graph.*
RTM Report Descriptions

Real-Time Monitor includes a variety of reports that you can view in various formats, depending on your needs. RTM reports include:

- Current Agent login Counts by Campaign
- Current Agents logged in by Campaign
- Current Agents logged in, selected Campaign
- Agent listening Queues by Campaign
- Current In-Queue Interactions by Campaign
- Current In-Process Interactions by Campaign
- Current Chat Interactions by Campaign
- Current Email Interactions by Campaign
- Current Fax Interactions by Campaign
- Current Phone Interactions by Campaign
- Today’s In-Queue Interactions by Campaign
- Today’s Completed Interactions by Campaign
- Today’s Abandoned Interactions by Campaign
- Today’s Received Interactions by Time range
- Today’s In-Queue Interactions by Time range
- Today’s In-Process Interactions by Time range
- Today’s Completed Interactions by Time range
- Today’s Abandoned Interactions by Time Range

The RTM reports are discussed in more detail on the following pages.
Current Agent login Counts by Campaign

The *Current Agent login by Campaign* report shows how many agents are currently working within the system for each campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td># Agents Logged In</td>
<td>Total number of agents who are logged in to that campaign.</td>
</tr>
</tbody>
</table>

Current Agents logged in by Campaign

The *Current Agents logged in by Campaign* report shows all the agents that are logged in by the campaign they are working in and their ready status.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td></td>
</tr>
<tr>
<td>Agent</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Ready or Not Ready</td>
</tr>
</tbody>
</table>

Field                  Description
---                     ---
Campaign               Campaign name.
Agent                  Name of agent logged in to that campaign.
Status                 The Agent’s ready status: Ready or Not Ready
Current Agents logged in, selected Campaign

The Current Agents logged in, selected Campaign report shows all the agents that are logged in for a specified campaign and their ready status.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Agent</td>
<td>Name of agent logged in to the current campaign.</td>
</tr>
<tr>
<td>Status</td>
<td>The Agent’s ready status: Ready or Not Ready</td>
</tr>
</tbody>
</table>

Agent listening Queues by Campaign

The Agent listening Queues by Campaign report shows the queues agents are listening to for each campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Agent Queue</td>
<td>Name of the queue the agent is using.</td>
</tr>
<tr>
<td>Agent</td>
<td>Name of agent logged in to that campaign.</td>
</tr>
</tbody>
</table>
Current In-Queue Interactions by Campaign

The Current In-Queue Interactions by Campaign report shows all interactions that are waiting to be handled by an agent for each campaign and interaction type.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># In Queue</td>
<td>Total number of interactions waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>

Current In-Process Interactions by Campaign

The Current In-Process Interactions by Campaign report shows how many interactions agents are currently handling for each campaign and interaction type.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># In Process</td>
<td>Total number of interactions being handled by all agents.</td>
</tr>
</tbody>
</table>
Current Chat Interactions by Campaign

The Current Chat Interactions by Campaign report shows the number of chats in process and in queue for each campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Status</td>
<td>The interaction’s status: in queue or in process.</td>
</tr>
<tr>
<td># Chats</td>
<td>Total number of chats in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that a chat was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that a chat was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Average time, in seconds, that a chat was in queue waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>
Current Email Interactions by Campaign

The *Current Email Interactions by Campaign* report shows the number of emails in process and in queue for each campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Status</td>
<td>The interaction’s status: in queue or in process.</td>
</tr>
<tr>
<td># Emails</td>
<td>Total number of emails in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that an email was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that an email was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Shortest time, in seconds, that an email was in queue waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>
Current Fax Interactions by Campaign

The Current Fax Interactions by Campaign report shows …

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Status</td>
<td>The interaction’s status: in queue or in process.</td>
</tr>
<tr>
<td># Faxes</td>
<td>Total number of faxes in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that a fax was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that a fax was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Shortest time, in seconds, that a fax was in queue waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>
Current Phone Interactions by Campaign

The Current Phone Interactions by Campaign report shows the number of calls in process and in queue for each campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Status</td>
<td>The interaction’s status: in queue or in process.</td>
</tr>
<tr>
<td># Calls</td>
<td>Total number of calls in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that a call was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that a call was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Shortest time, in seconds, that a call was in queue waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>
Today’s In-Queue Interactions by Campaign

The Today’s In-Queue Interactions by Campaign report shows the total number of interactions waiting to be handled by an agent and the longest, average and shortest waiting times for each interaction type within a campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># In Queue</td>
<td>Total number of interactions waiting to be handled by an agent in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Shortest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>
Today’s Completed Interactions by Campaign

The Today’s Completed Interactions by Campaign report shows the total number of interactions completed; the longest, average and shortest waiting times in queue; and the longest, average and shortest processing times for each interaction type within a campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># Completed</td>
<td>Total number of interactions completed in that campaign.</td>
</tr>
<tr>
<td>Longest Wait In Queue</td>
<td>Longest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Avg Wait In Queue</td>
<td>Average time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait In Queue</td>
<td>Shortest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Longest Process Time</td>
<td>Longest time, in seconds, that an agent took to process an interaction.</td>
</tr>
<tr>
<td>Avg Process Time</td>
<td>Average time, in seconds, that an agent took to process an interaction.</td>
</tr>
<tr>
<td>Shortest Process Time</td>
<td>Shortest time, in seconds, that an agent took to process an interaction.</td>
</tr>
</tbody>
</table>
Today’s Abandoned Interactions by Campaign

The Today’s Abandoned Interactions by Campaign report shows the total number of abandoned interactions and the longest, average and shortest waiting times until abandonment for each interaction type within a campaign.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or E-mail.</td>
</tr>
<tr>
<td># Abandoned</td>
<td>Total number of interactions abandoned in that campaign.</td>
</tr>
<tr>
<td>Longest Wait Until Abandon</td>
<td>Longest time, in seconds, that a customer waited before abandoning, or quitting, an interaction.</td>
</tr>
<tr>
<td>Avg Wait Until Abandon</td>
<td>Average time, in seconds, that a customer waited before abandoning, or quitting, an interaction.</td>
</tr>
<tr>
<td>Shortest Wait Until Abandon</td>
<td>Shortest time, in seconds, that a customer waited before abandoning, or quitting, an interaction.</td>
</tr>
</tbody>
</table>
Today’s Received Interactions by Time range

The Today’s Received Interactions by Time range report shows the total number of interactions received for all campaigns and interaction types by time.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Report start time.</td>
</tr>
<tr>
<td>End Date</td>
<td>Report end time.</td>
</tr>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># Received</td>
<td>Total number of interactions that occurred between the start and end dates that were received in that campaign.</td>
</tr>
</tbody>
</table>
Today’s In-Queue Interactions by Time range

The Today’s In-Queue Interactions by Time range report shows the total number of interactions waiting to be handled by an agent and the longest, average and shortest waiting times for all interactions that are in queue for all campaigns and interaction types by individual time slots.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Report start time.</td>
</tr>
<tr>
<td>End Date</td>
<td>Report end time.</td>
</tr>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># In Queue</td>
<td>Total number of interactions that occurred between the start and end dates that were waiting to be handled by an agent in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Shortest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
</tbody>
</table>
Today’s In-Process Interactions by Time range

The *Today’s In-Process Interactions by Time range* report shows the total number of interactions being handled by agents; the longest, average and shortest waiting times; and the longest, average and shortest processing times for all interactions that are in process for all campaigns and interaction types by individual time slots.

### Field | Description
--- | ---
Start Date | Report start time.
End Date | Report end time.
Campaign | Campaign name.
Interaction Type | Type of interaction: Phone, Chat, Fax or Email.
# In Process | Total number of interactions that occurred between the start and end dates handled by all agents.
Longest Wait | Longest time, in seconds, that an interaction was in queue waiting to be handled by an agent.
Average Wait | Average time, in seconds, that an interaction was in queue waiting to be handled by an agent.
Shortest Wait | Shortest time, in seconds, that an interaction was in queue waiting to be handled by an agent.
Longest In Process | Longest time, in seconds, that an agent took to process an interaction.
Avg In Process | Average time, in seconds, that an agent took to process an interaction.
Shortest In Process | Shortest time, in seconds, that an agent took to process an interaction.
**Today's Completed Interactions by Time range**

The *Today’s Completed Interactions by Time range* report shows the total number of interactions completed; the longest, average and shortest waiting times; and the longest, average and shortest processing times for all completed interactions for all campaigns and interaction types by individual time slots.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Report start time.</td>
</tr>
<tr>
<td>End Date</td>
<td>Report end time.</td>
</tr>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax or Email.</td>
</tr>
<tr>
<td># Completed</td>
<td>Total number of interactions that occurred between the start and end dates that were completed in that campaign.</td>
</tr>
<tr>
<td>Longest Wait</td>
<td>Longest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Average Wait</td>
<td>Average time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Shortest Wait</td>
<td>Shortest time, in seconds, that an interaction was in queue waiting to be handled by an agent.</td>
</tr>
<tr>
<td>Longest In Process</td>
<td>Longest time, in seconds, that an agent took to process an interaction.</td>
</tr>
<tr>
<td>Avg In Process</td>
<td>Average time, in seconds, that an agent took to process an interaction.</td>
</tr>
<tr>
<td>Shortest In Process</td>
<td>Shortest time, in seconds, that an agent took to process an interaction.</td>
</tr>
</tbody>
</table>
Today’s Abandoned Interactions by Time range

The Today’s Abandoned Interactions by Time range report shows the total number of abandoned interactions and the longest, average and shortest waiting times until abandonment for all campaigns and interaction types by time.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Report start time.</td>
</tr>
<tr>
<td>End Date</td>
<td>Report end time.</td>
</tr>
<tr>
<td>Campaign</td>
<td>Campaign name.</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Type of interaction: Phone, Chat, Fax, or Email.</td>
</tr>
<tr>
<td># Abandoned</td>
<td>Total number of interactions that occurred between the start and end dates that were abandoned in that campaign.</td>
</tr>
<tr>
<td>Longest Wait Until Abandon</td>
<td>Longest time, in seconds, that a customer waited before abandoning, or quitting, an interaction.</td>
</tr>
<tr>
<td>Avg Wait Until Abandon</td>
<td>Average time, in seconds, that a customer waited before abandoning, or quitting, an interaction.</td>
</tr>
<tr>
<td>Shortest Wait Until Abandon</td>
<td>Shortest time, in seconds, that a customer waited before abandoning, or quitting, an interaction.</td>
</tr>
</tbody>
</table>
Summary

- Synchrony’s RTM is a reporting tool that allows supervisors to view data and statistics in real time.
- By displaying campaign information in real-time, RTM helps supervisors make decisions as changes actually happen.
- The primary users of RTM are the campaign supervisors. However, operations managers and analysts may occasionally use RTM in conjunction with the Synchrony Business Intelligence solution in order to get immediate information.
- While RTM does provide features and benefits similar to Synchrony’s Business Intelligence (BI) solution, RTM differs in that it:
  - Displays trends and results as they occur.
  - Can display report data for the past 24 hours.
  - Can display data in multiple formats (tables, graphs, etc.) and in multiple windows simultaneously.
  - Refreshes data at a user-defined interval, ranging from 15 seconds to 20 minutes.
- Using Synchrony’s RTM is a streamlined process consisting of four major steps:
  - Opening RTM
  - Viewing Reports
  - Changing Report Views
  - Changing Data Sets
- When opening reports, you have the option to view a single report or multiple reports simultaneously.
- The RTM Windows Toolbar provides a means to open, close, refresh and layer report windows in the RTM workspace.
- The Report Toolbar controls the specific views for each report in the workspace and allows you to manipulate the way in which you view the data, including table and graph views.