DEFINING THE ROLE OF THE TECHNICAL COMMUNICATOR: AN INTERNSHIP WITH THE WEB-BASED LEARNING GROUP AT THE KROGER COMPANY

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This report discusses my internship experiences at the Kroger Company in Cincinnati, Ohio, where I worked as a technical writer from May 2004 through August 2004. The report describes working in the expanding field of web-based learning for the largest grocery retailer in the United States. I discuss my role within the organization, the contributions I made to the Web-based Learning group, and the ways in which I demonstrated the value of technical communication when developing learning products. This report presents a sample training course project where I was responsible for helping with initial planning, editing and revising content, providing suggestions for visual presentation, and assisting in final development.
DEFINING THE ROLE OF THE TECHNICAL COMMUNICATOR:
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AT THE KROGER COMPANY

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Chapter One: Introduction to The Kroger Company

I encountered the cultures of city life and corporate America as I began my internship experience with the nation’s largest grocery retailer, the Kroger Company. Located directly in downtown Cincinnati, the twenty-five-story Kroger general operations office stands as one of the landmarks in the greater Cincinnati community. Starting on May 17, 2004 and concluding on August 20, 2004, my internship for the Master of Technical and Scientific Communication (MTSC) degree program at Miami University came with many challenges including defining my role and defending the value of technical communicators within a business setting.

I anticipated the start of my internship as a technical writer with feelings of excitement and nervousness. I believed that with my background in both technology and technical writing that I would be able to successfully fill the role that I would be stepping into. However, much to my surprise, the team I became a part of had as many questions for me about the role of a technical communicator as I did for them. In the end, what I contributed to the group was far more than anything either I or they had expected.

This report focuses on four different areas of my internship experience: 1) a discussion of the Kroger Company as an organization, 2) an overview of my role within the organization, 3) an analysis of my role in the “Customer Service and Proper Bagging Techniques” web-based learning course development project, and 4) a reflection on my experience with the Kroger Company in light of my future as a technical communicator. The purpose of this first chapter is to present the rich history, organization, and culture that make up the Kroger community and to introduce the Web-based Learning group.

History, Organization, Culture, and Impact on the Global Marketplace

The Kroger Company (referred to as “Kroger” from this point) is America’s largest grocery retailer and a listed Fortune 500 company. It dates its beginnings back to 1883 when founder, Barney Kroger, opened a small store in downtown Cincinnati. The company was operating forty stores by 1902. Kroger’s growth continued over the next century, and today it operates over 2,300 stores, 40 manufacturing facilities, and more than 800 convenience stores in 38 states. Kroger currently operates under nearly two-dozen banners such as Fred Meyer, King Soopers, and Ralphs, and employs over 300,000
people. Kroger’s largest corporate office is located in downtown Cincinnati, where I completed my 14-week internship.

Kroger’s general offices (often referred to as “GO”) are home to the organization’s Information Systems and Services (IS&S) Department, of which I was a member. The IS&S Department is comprised of five major groupings, each responsible for different facets of Kroger’s technical services throughout the organization. Figure 1.1 shows the organizational structure of the IS&S Department.

Having competed in the grocery retail market for over a century, Kroger has established a unique corporate culture. Kroger is known for loyalty to its employees, as is evident in the number of long-term employees whose personal growth and success enrich the organization. In fact, Kroger employees in the corporate office maintain an average of 11 years of service (statistics obtained from the Kroger Company Human Resources).
Resources Department on September 13, 2004). Kroger allows flexible work scheduling, regular internal advancement, personal development, and an open-door policy that encourages all employees to openly discuss issues of concern with department supervisors and directors.

With its long history, Kroger is also a very traditional company in many ways. Internal change, especially in terms of technology, is a slow process. Changes to current methods and policies have to be thoroughly tested and widely accepted. This is not to say that Kroger as an organization is not open to change because the company is continually looking to improve the way it goes about business. However, any changes which would replace current, already successful methodologies need to be justified. Kroger’s long-time success and stability in the retail grocery marketplace attests to the fact that its practices in requiring strongly justified change are effective in the corporate world. While Kroger has been in existence for over a century, the Web-based learning group was not established until January, 2004.

The Web-based Learning Group

Situated on the 24th floor of the Kroger building resides the Web-based Learning (WBL) group, which functions as part of the Intranet Support and Training (IST) group within Enterprise Store Systems. When I joined as a technical writer, I became the sixth member of the recently formed WBL team that already included a group manager, a group leader, and three developers. I faced many challenges in filling the newly created technical writer position, such as convincing others of contributions beyond editing that I could make to the group. Chapter two explores in-depth how this position was defined and evolved.

The mission of the WBL group is to provide web-based training to in-house clients within the Kroger organization. This web-based training is delivered in the form of an in-house program called Help Creator, application simulations, and web-based learning courses. The completed training products developed by the WBL group are typically used for the purposes of training store, warehouse, or corporate employees. These training products are made available to all the Kroger divisions across the country via the company’s intranet.
The first web-based learning product that the WBL group provides is Help Creator, an online reference tool developed in-house using Macromedia ColdFusion and JavaScript. Help Creator allows the user to place a set of help and reference materials on an internal group’s web site for use by employees within the group. The WBL group provides training on the use of the Help Creator software and on the deployment of the help and reference materials onto the group’s site.

The WBL group also develops application simulations (ASims) using Macromedia RoboDemo. These simulations provide a visual walkthrough on how to use a particular software application by including a pre-recorded movie showing an enactment of specific operations within the application. The ASims also include a set of text captions that instruct the users how to perform operations and why specific components in the application behave the way that they do. The ASims are also developed based on a set of best practices (listed in Appendix B) created by one of the WBL group developers.

The WBL group’s most popular and time-intensive training product is the web-based learning (training) course. The courses are constructed using Macromedia Flash, Macromedia ColdFusion, and standard hypertext markup language (HTML). The courses are then compiled using Kroger’s Help Creator software and made available on the company’s intranet. The courses are made as interactive as possible, given time and file size constraints. Each course is centered on a series of three to four high-level learning objectives, which should take the user around ten minutes each to complete. A series of best practices (listed in Appendix A) created by the original members of the WBL group are adhered to during the development of the web-based learning courses.

All three of the web-based learning products have a specific product development process as mapped in the WBL group’s web-based learning methodology shown in Figure 1.2. Each project begins with a client request to the WBL group leader who schedules a kickoff meeting and develops a site for the project on the Kroger intranet. The development phase branches off into one of three directions based on the client needs established through the kickoff meeting. Each branch corresponds to the type of product needed. Over the next several weeks (or months in some cases) the project passes
through a series of milestones until the completed project is fully developed, approved by the in-house client, and made available for employee use.

Figure 1.2 WBL Group Web-based Learning Methodology

The WBL group methodology is similar to the Cascading Course Planning Model developed by Dr. Ronald Fetzer (2003). Fetzer’s approach, which emphasizes design,
planning, and content reuse provides a seven phase process for developing an effective instructional course. As in the Cascading Course Planning Model, WBL products are developed through a thorough evaluation of the client’s needs and are reviewed multiple times by both the client and the WBL group to ensure substantial learning by the end users. Similarities to the Cascading Course Planning Model are most evident in the WBL group course development process, which is detailed in Chapter Three.

This chapter provided an introduction to my 14-week internship with the Kroger Company. In the following chapters, I discuss my role as technical writer in the WBL group, review one of the major projects I contributed to, and analyze the impact of my contributions to the WBL group and the value of technical communicators in web-based learning.
Chapter Two: Defining the Role of the Technical Communicator

I shared some uncertainties with my other team members about my role because I was the first technical writer in the WBL group at the Kroger Company. Never having worked in an environment like Kroger before, I knew little about the organization’s training products and expectations. While I was hired as a technical writer, I wanted to demonstrate the diversity of skills I could offer as a technical communicator.

The WBL group members, not being familiar with the role of technical communicators, did not have a complete understanding of all of the different skill sets that I brought. The WBL group leader was experienced in project management and business operations. The developers were experienced in graphic design and software development. However, the team members’ experience with content management and instructional design was limited. Due in part to my limited knowledge of the subject matter involved in the training materials that the WBL group was creating, some members initially assumed that document editing was the primary skill I could contribute to the success of the group. However, this assumption was dismissed as my knowledge of Kroger practices and applications increased and my other possible contributions were realized. This chapter will show the ways I defined my role within the WBL group and the contributions I made as a result.

Becoming Integrated into the WBL Group

The first few weeks of my internship were the most challenging because of my limited knowledge of the WBL group’s training products and the development processes used to create those products. Having a background in information technology, I had an understanding of the tools that were used to create the products, but I was less familiar with the WBL group’s product development process: specifically, how a project progressed from the kickoff phase until the product release during the rollout phase. Through communicating with my writing mentor (a MTSC graduate), working with the WBL group leader, and working with one of the WBL group developers, I was able to gain the understanding of the processes involved in product development.

As I became more comfortable with the web-based learning process and the work dynamic within the WBL group, I regularly offered my opinion on ways to improve the
learning for our end users. I began to assert myself to the WBL group and touted technical communication as an asset to the web-based learning field. My comments and obvious interest in the development processes were well received by the other members of my team. One of the developers commented that he had expected something much different when working with an intern and was surprised by both how much I wanted to contribute and how much I could contribute. Breaking the expected intern stereotype, I was viewed as a peer. I took an active role throughout the development process of the various web-based learning projects by attending the project meetings, contributing design ideas, and providing more organizational edits to course content documents.

My increased role led me to attend – and in some cases to lead – course and simulation planning sessions, content outline meetings, text review meetings, detailed design meetings, initial product walkthroughs, and final product walkthroughs. In each of these meetings, I was asked to contribute organization, design, and presentation ideas, as well as suggest ways to improve the quality of the information being taught. Often times I was the person most familiar with the course content, and I regularly took the leadership role in the text review meetings by scheduling the events, creating the agendas, and leading the discussions. I also took a leadership role in initiating the brainstorming session, which was a new event that was in the process of being added to the list of milestones for the web-based learning methodology in the final weeks of my internship. As I became integrated into the WBL group, I was able to take on additional responsibilities.

**General Responsibilities**

I was responsible for editing learning course and application simulation content, developing application simulations, and creating the WBL Newsletter. I spent the majority of my time editing the course and simulation projects. However, as I became more familiar with Kroger processes, I was given additional tasks. Editing course and simulation content accounted for 85% of my time, developing simulations accounted for 5% of my time, creating the WBL Newsletter accounted for 5% of my time, and the remaining 5% of my time was spent training, researching, or performing miscellaneous tasks such as recording the hours I committed to each task in Microsoft Project.
**Editing Course and Simulation Content**

My primary role was to edit content for client-requested web-based training courses and application simulations. Throughout my internship, I edited text for a total of 13 different courses and over 20 simulations.

As discussed previously in Chapter One, training course requests would come from in-house department clients such as Retail Operations, Human Resources, and Pharmacy. The course subjects ranged from the proper use of in-house software applications to standard store operation policies and procedures. The course content was provided by the clients (see course content development worksheet, as shown in Appendix C). I first entered into the web-based learning methodology for the WBL courses at the text review milestone (see Figure 1.2). This milestone entailed reading, understanding, testing (when applicable), and editing the course content.

The initial challenges involved with the text review were twofold: first, I was unfamiliar with Kroger applications and conventions; second, the WBL group had not defined a style guide or course content standard to base my edits on. Because of my past experience with using and testing software applications, the first challenge was easier to overcome than the second. To help in the learning process, I kept a log containing the jargon and the numerous acronyms that I encountered in meetings and through other discourse within the organization. In this log, I defined each acronym and included a brief explanation of the unfamiliar terms. Soon, I was able to fully participate in the various group and client meetings that I attended, as well as feel more comfortable reviewing the course content.

My greater challenge was to edit course content without a style guide. While reviewing the content for my first course, I took it upon myself to develop a style guide including a set of text conventions and formatting rules that I entitled, “WBL Text Standards” (Appendix D). This document defined the presentation of text and formatting in web-based learning (WBL) courses for the following components:

- Instruction formats (body text, instruction box text, error message box text)
- Text standards (body text, instruction box text, error message box text)
- Capitalization rules
- Italicizing rules
- Quotation rules
I developed the standards with the understanding that they would evolve and change along with the product. I made changes to the WBL Text Standards document over my internship, and I expect that more changes will be made in the future. However, even having a dynamic standard in place allows me and future WBL technical writers to have a basis for editing course content.

For the first few courses, I focused more on a rudimentary edit of the grammar in the text. I checked for regularly occurring typographical errors, improper sentence structure, use of undefined acronyms, and naming inconsistencies. However, as my role evolved, I began to make more organizational edits to the course content in future courses such as the “Customer Service and Proper Bagging Techniques” training course, referenced to in the next chapter.

My duties also involved being the technical writer and editor for the application simulation projects. Unlike the text for the learning courses, the text for the simulations was composed during the simulation development process. As a result, I attended several meetings with the simulation designer and the application subject matter expert to help compose text that would aid user understanding of the application being presented. The simulation designer would present the working simulations on a projector and the team would work together to compose appropriate text for the text captions. This role was challenging because I often had to contribute to developing appropriate content on-the-fly without the benefit of reference materials or a strong understanding of the application itself. However, if I were unfamiliar with how a section of an application operated, I was able to review the application on my own time and provide text changes after the review.

I found the editing process to be both challenging and educational. While I have always had an interest in writing, I had limited instruction in writing and editing techniques before entering the MTSC program. Editing the course content allowed me to apply the techniques I learned through the MTSC program, but also required me to perform research on areas I had not been exposed to. While being a technical editor is not a long-term career path that I would pursue, I value the experience I gained through my editorial duties in the WBL group. Besides editing, there were several other opportunities that I was able to pursue during my internship, such as developing application simulations.
Developing Application Simulations

Having expressed my interest in becoming more involved with the development side of the web-based learning process, I worked with the Macromedia RoboDemo software package and helped develop several application simulations (ASims) for in-house clients. As discussed in Chapter One, ASims provide video enactments of specific operations within a software application. Unlike my initial contributions in the course development process, I was involved in the entire ASim development process as outlined in Figure 1.2. The development methodology of ASims is very similar to that of WBL courses. However, based upon the design tools used, the development time for an individual ASim is significantly shorter than the development time of an individual course. On the other hand, clients would often request multiple ASims for a particular software application, each highlighting a particular function within that application.

I was directly involved in the development of ASims for two separate in-house clients, each of whom requested simulations of two different software applications. Both applications were newly developed and still in the late stages of testing. Therefore, developing a functional and informative set of ASims for each application was key. Since all users were going to be new to the product, the simulations needed to fully demonstrate the functionality of the particular features of the product.

After the clients’ needs were established, I spent a significant amount of time learning how to use the product before any development began. This involved getting appropriate administrative-level access to the different software applications, accessing the applications from the company intranet, and then working with the applications in order to better understand the product. I benefited from this pre-development phase because I was able to evaluate the applications just as my audience would, since we were both first-time users. Consequently, I was able to develop the ASims with the first-time user experience at the center of each simulation.

Just as with the WBL courses, the ASims are reviewed multiple times to ensure the best possible product. After multiple reviews and revision suggestions from the client, actual users conduct testing on the simulations to check for previously undetected flaws. After the simulations are approved through testing, they are appropriately rolled out to the different store divisions.
Creating the WBL Newsletter

With my evolving role in the WBL group, I took on other new projects as well. I developed the first issue of the WBL Newsletter, which is shown in Appendix E. The development involved researching various web-based learning methodologies and trends, as well as becoming very familiar with the WBL group’s project timeline and outlook. The newsletter consisted of two articles, several “fun facts” about the web-based learning industry, and the current and expected project releases by the WBL group. I felt that it was appropriate to define web-based learning and how it impacts training at Kroger since it was the first issue of the newsletter. In an article entitled “What is Web Based Learning?” I discussed the effectiveness of web-based learning solutions and presented the assorted products that the WBL group provides. The newsletter was reviewed by the members of the WBL group, posted on the company’s intranet, and sent to company supervisors and current WBL clients for distribution.

The newsletter was well received, although its primary distribution method of being posted on the Kroger intranet was a limitation. The existence of the newsletter was spread through email messages to current and former WBL group clients and through word of mouth. Not having the newsletter printed and distributed was a disappointment because of the time I committed to creating it and to the additional business it could have generated for the WBL group. However, enough positive feedback was received that the WBL group intends to publish more issues in the future.

In Chapter Three, I review one of the major projects that the WBL group developed during my internship and closely analyze how my contributions directly affected the finished product.
Chapter Three: An Instructional Design Project

One of the major projects during my internship was to help in the design of the “Customer Service and Proper Bagging Techniques” training course. Because I was only given permission to discuss the details of this course and no other, I had to obtain approval from the Kroger Legal Department to publish information pertaining to this course (Appendix F). The contributions that I made to this project are representative of the editing and instructional design methods that I used throughout my time with Kroger. My work with this course was particularly challenging because of the high expectations the client had due to the number of employees that would be required to take the course. This chapter will describe the course development process, discuss my role in each phase of the project, and examine how my contributions improved the product for the end users.

Course Development Process

The course development process consists of four phases: request, planning, development, and review, testing, and implementation (see Figure 3.1). As I discussed in Chapter One, the WBL Group’s course development process is similar to Fetzer’s Cascading Course Planning Model because both follow a highly-structured design strategy.

Figure 3.1 Course Development Process Outline
Request Phase
The client is responsible for initiating each course development project by sending a request to the WBL group leader, who evaluates the request and schedules a kickoff meeting with the client. The WBL group leader also creates a web site for the project that is used to store any documents developed for the project. The web site, which is located on the company’s intranet, allows both the client and the WBL group members access to the project related documents. The final step in the request phase is the kickoff meeting where the client and the WBL group leader meet one-on-one to discuss the client’s needs and determine the product best suited for the client: training course, application simulation, or Help Creator training.

Planning Phase
Following the kickoff meeting, if the client and the WBL group leader agree that a training course is the best solution, the project enters the planning phase. If either a set of simulations or training on Help Creator is more appropriate, the next step in the corresponding methodology is followed (see Figure 1.2). The next step in the course development process is to hold a planning session to determine the high-level objectives and a tentative outline for the course. Often, other client representatives, subject matter experts, WBL group developers, and the WBL group technical writer become involved in the course development process by attending this meeting. Each attendee is expected to provide input on topics to cover, content to include, and how to organize the course. Based on the decisions made at the meeting, it is the client’s responsibility to develop the initial draft of the course content. This content, developed on the course content development worksheet (Appendix C), includes all of the text that will be displayed to the user and any suggestions for visuals or interactive content. Once developed, the content is submitted to the WBL group technical writer for reviewing and editing.

The course text review requires an analysis of the course content including the title, the body text, and the pre- and post-quiz questions. A standard practice of the WBL group is to include a pre- and post-quiz at the beginning and end of each training course. Each quiz contains an identical set of questions with the goal of collecting measurable data that indicates the users gained knowledge from taking the course. In the pre-quiz users are asked a set of approximately 15 multiple choice questions (more or less...
depending on the length of the course). The users are not informed of the answers, nor are they informed of the number of correct answers that they provided. The post-quiz contains the identical set of questions, but this time, following each question, the users are informed of whether or not they answered correctly and what the correct answer is to that question. In order to pass the course, the users need to get a certain percentage of the questions correct. The default percentage is 80%, but can be changed based upon the client’s request. If users fail the course, they are required to take the entire course again.

The significant flaw to the pre- and post-quiz system is that the users are informed at the beginning of the course of the questions that they will be asked in order to pass the course. Therefore, the users have the capability of skimming the course to find the answers and consequently not fully benefit from the training. Since there is a need to justify the time and cost of the training courses, the quizzes serve as more of a credibility tool than as an evaluation tool. If users are shown to significantly benefit from the training courses, the need for the training products is justified. The value of the pre- and post-quiz system is a regular point of contention within the WBL group and the topic gets explored further in Chapter Four. Following the text review, the technical writer distributes the content to both the client and the WBL group leader and the text review meeting is scheduled.

The client, the WBL group leader, the technical writer, and one of the WBL group developers attend the text review meeting to discuss changes that were made to the course content. The client is able to ask the technical writer about the rationale for the changes made to the content and the technical writer provides justification for those changes. All attendees are able to give input on the content as well. The goal of the meeting is to create a strong draft of the content before advancing to the development phase of the process. Following the meeting, the technical writer makes any changes to the content, forwards the content back to the client and the team, and, pending client approval, suggests that the project advance to the development phase.

**Development Phase**

The development phase is the most time-intensive phase of the course development process. One WBL group developer is assigned to the course and develops the first version of the course from start to finish while working exclusively on that
The development phase begins with the detailed design meeting, which typically includes the same attendees from the planning session. In this meeting, the assigned developer creates a scene-by-scene storyboard of the course based upon input from the meeting attendees. Each scene in the storyboard refers to a particular section of text from the course content development worksheet and includes an agreed upon series of actions that correspond to the text. These actions can include character and object animation, the appearance of text and images, and specific sound effects. The developer then uses the storyboard to develop the course.

After the developer has created the course, the client representatives and the involved WBL group members again meet for the initial walkthrough, or the initial presentation of the course to the client. In this meeting, the client and team members review the course and provide suggestions for changes. The developer records all of the agreed upon change suggestions to use for the final development of the course.

**Review, Testing, and Implementation Phase**

The review, testing, and implementation phase begins with the final course development and includes making changes agreed to in the detailed design meeting, plus adding the audio features to the course. During this phase in the development process, the course is fully functional and available on the company’s intranet. Therefore, the client can access the application and request minor changes to be made. The other WBL group members have the ability to review the course as well if time permits. After the developer has completed the course, another WBL group member performs the technical review test on the course. The goal of this test is to locate any technical problems with the course such as broken or misdirected links, faulty animation, or invalid test answers.

After all changes have been made, the client signs off on the course and selects a store division to pilot the course. Employees in the pilot division take the course for both training purposes and for locating any problems that were previously missed. The employees in the pilot division are able to access the course through their division’s site on the company’s intranet. After the pilot testing is complete and any additional changes are made, the course is rolled out to all store divisions by making it available on all applicable divisions’ sites. The next section describes my role in the development process for the “Customer Service and Proper Bagging Techniques” training course.
Course Planning Session

After our team agreed to create a training course for the Retail Operations Department, an in-house client, a planning session was held to determine the high-level objectives and a tentative outline for the course. The session attendees included a representative from Retail Operations, that department’s secretary, the WBL group leader, a WBL group developer, and me. In the meeting, the team members developed a clear idea for the type of course that Retail Operations needed. The goal was to create a course for courtesy clerks about the techniques for bagging customer purchases. The theme for the course was “Strive for Five,” a corporate slogan regularly used to encourage clerks to fill bags with a minimum of five items. The “Strive for Five” campaign had been initiated by Kroger administrators to reduce the excessive use of plastic bags in the stores.

The participants in the planning session agreed upon an initial outline for the course (see Figure 3.2), which the client would use to structure the content. Using materials from the “Strive for Five” media brochure, the Retail Operations group was charged with the task of developing the course content based on the outline.

I. Introduction
   A. Welcome
   B. Statement of Purpose
   C. List of Objectives
   D. Pre-quiz

II. High-level Objective: How to Properly Bag

III. High-level Objective: These Items Don’t Need Bags

IV. High-level Objective: BOB – Bottom of Bascart

V. High-level Objective: Best Practices
   A. Sub-Objective: Don’t Double Bag
   B. Sub-Objective: Plastic vs. Paper
   C. Sub-Objective: Always Ask: “Is Plastic OK?”
   D. Sub-Objective: Report Defective Bags
      1. Define Defective Bag
      2. Where to Report Defective Bags

VI. High-level Objective: Customer Service
   A. Sub-Objective: Greet Customers with a Smile
   B. Sub-Objective: Be Friendly, Courteous, and Helpful
   C. Sub-Objective: Help Unload Bottom of Bascart
   D. Sub-Objective: “Is Plastic OK?”
   E. Sub-Objective: Properly Bag the Order
   F. Sub-Objective: Load the Bascart with Care
   G. Sub-Objective: Thank the Customer

VII. Conclusion
   A. Restate Objective Covered
   B. Post-quiz

Figure 3.2 “Customer Service and Proper Bagging Techniques” Training Course Initial Outline
Text Review

After the client developed the initial course content (Appendix G), it was my responsibility to provide both a low-level edit and to suggest more organizational edits for the group to consider. The “Customer Service and Proper Bagging Techniques” training course was the first course to be developed for this client. Although the Retail Operations group had been supplied with examples from other courses, the content they developed did not effectively teach the course objectives. Therefore, the editing required much more than low-level grammatical and typographical adjustments. I needed to perform a substantial revision of the content.

Since no precedent was in place, I developed a systematic approach to editing the content for each new course that I was given. The approach I used to edit the “Customer Service and Proper Bagging Techniques” training course was as follows:

1. Review entire course on an organizational level checking for consistency against original outline.
2. Read entire content to understand techniques used by the author and to become familiar with the subject matter.
3. Perform a low-level edit throughout the entire text and include suggestions for more organizational and content changes.

The ultimate challenge in editing the course content was to find a balance between providing sufficient explanations of objectives and keeping the text at a minimum. This challenge was a regular point of contention between me and other members of the WBL group. In many situations, I felt that not enough text was being included to support the overall learning objectives. Yet, most clients (this one included) requested that the courses be as short as possible because of the costs associated with lost employee hours due to the training. In the text review, I was required to present the necessary information with the least amount of text.

The training courses use both images and text to reinforce learning. Even though at this point in the course development process (text review) the actual images and user interactions had not been storyboarded, I became familiar enough with the development process to realize what type of visual learning would be needed. I made my edits and suggestions based upon the notion that the images and the text would be complementary – neither one more significant than the other.
In part, I drew my editing methodology from Schriver (1997, p. 397) who argues that “Contrary to popular opinion, readers wanted not less prose but more.” Schriver argues that web content that integrates both images and text often does not include enough prose to support the images being presented. I analyzed the text with two particular mindsets: how would the target audience interpret the material being presented, and how would the audience gain the necessary learning from the course by seeing it only one time? The target audience in this case was fourteen-to-sixteen-year old courtesy clerks, an entry-level position in Kroger stores nationwide. Given the expected educational level of the courtesy clerks, the course needed to be presented as clearly and directly as possible using simple English. While probably never viewing the course themselves, store managers and corporate employees would comprise a secondary audience. They would benefit from the course by having a set of customer service guidelines defined for the courtesy clerks. Drawing from Schriver’s suggestions and my experience with previous courses, I revised the text to succinctly present all of the necessary ideas.

My edited text was sent to the WBL team members and the client for review and approval. The WBL group leader scheduled a formal text review meeting where I could present my justification for the text edits and provide suggestions for more content revisions. At the meeting, the client, the client’s secretary, the WBL group leader, and I revisited the text, reviewed the changes, and analyzed the content for any additional changes that could be made. Most of the changes I had made to the content were accepted by both the WBL group leader and the client. However, all participants worked together to locate any additional wordiness in the revised text.

Following the text review meeting, I made another series of edits based upon the changes discussed at the meeting. I completed the edits and forwarded the document back to the group for approval. Within a few days, the client approved the revised text and the project moved to the next phase.

**Detailed Design**

Following approval of the text, a detailed design meeting was scheduled. In this meeting, the WBL developer created a scene-by-scene storyboard for the “Customer Service and Proper Bagging Techniques” training course based upon input from the
group. A sample storyboard scene for the course is included in Appendix H. Being familiar with the objectives and the content of the course, I presented ideas on how the course should be visually presented to the end users. For example, I encouraged the idea of replacing the traditional text-based pre-quiz with a more interactive, scenario-based introductory quiz. After agreeing to this method, the group developed a series of scenarios based on actual situations that the courtesy clerks might encounter. The users would be presented a short movie of an interaction between a customer and a courtesy clerk and then be asked to judge whether the courtesy clerk behaved correctly in the scenario. Following the meeting, the text and storyboard materials were handed off to the course developer who began developing the course using Macromedia Flash and Help Creator.

**Initial Walkthrough**

After the developer created a working version of the “Customer Service and Proper Bagging Techniques” training course, the WBL group leader scheduled an initial walkthrough meeting to present the course to the client as it would appear to end users. Prior to the meeting, the client was able to view the working course on the company intranet and made a series of notes based upon his review. In the meeting, which lasted over three hours, the group walked through the course scene-by-scene, made comments on the visual presentation, and suggested further revisions.

Based on the client’s assessment, the group determined that the course needed to focus more on the customer service provided by the courtesy clerks and not as much on the bagging portion. This decision required a major revision to both the course content and the training application. The following is a list of the major decisions that were reached at that meeting:

- The course needs to change focus from the “Strive for Five” campaign to the “Customer First” campaign.
  “Customer First” is a new campaign at Kroger that emphasizes quality customer service. The client felt that the course had evolved into a customer service oriented course and the “Customer First” campaign would be more important than the “Strive for Five” campaign.
• The order of the content needed to be reorganized to focus on the customer clerk’s duties for each customer.

    The client wanted to create a beginning-to-end simulation of the courtesy clerks’ duties when working with a customer. Therefore, the client wanted the content to be reorganized to create that beginning-to-end process.

• Several of the visual elements needed to be altered to improve end user learning.

    The client had located items in the visual presentation that he wanted changed, including unclear graphical elements and text font sizes.

• The interactive sections needed to be placed more appropriately within the course.

    The developer had placed several of the interactive elements sequentially in the course. The client and the other WBL group members wanted the interactive elements distributed more equally throughout the course in order to keep the users involved.

**Final Development**

Since these changes were substantial and they involved both the content and application itself, the WBL group leader, the course developer, and I worked closely to implement the changes. We needed to find a way to present the content in light of the decisions that had been made at the initial walkthrough meeting. Before any text revisions were completed, we agreed upon the following changes:

• Directly incorporate the “Customer First” theme into the introduction and concluding scenes.

• Include the “Customer First” icons and use them in place of the “Strive for Five” icons.

• Modify the Customer Service high-level objective section into a recapping of the customer service techniques presented throughout the previous sections of the course.

While these changes were difficult to implement, the WBL group did so with the goal of providing the best possible training in the shortest time possible. I worked diligently to incorporate the “Customer First” theme throughout the course and to reorganize the content to fulfill the course’s new focus. Appendix I contains the final version of the course content I developed for the project. The client approved the
changes and at the conclusion of my internship, the course was undergoing final testing and review. Figure 3.3 shows a sample screenshot from the completed course.

![Figure 3.3 Screenshot from the “Customer Service and Proper Bagging Techniques” Training Course](image)

Chapter Four examines the impact I had in the WBL group at Kroger and how my internship will impact my future as a technical communicator. I will analyze the challenges I faced in defining my role within the group and validating the importance of technical communication. I conclude with thoughts on the personal learning I gained as a result of my internship at Kroger.
Chapter Four: The Value of Technical Communicators on a Web-based Learning Team

The impact I had on the Web-based Learning group at Kroger surpassed the expectations of my team members and our clients. I attribute my success in the WBL group to the practical instructional design methods taught in the MTSC program at Miami University. This chapter draws conclusions between what I have learned in the MTSC program and the experience I gained working as a technical writer for Kroger. Specifically, I discuss areas where I was able to apply my learning to my internship duties and how the results of my work reflect the validity of the MTSC curriculum and the value of technical communicators in the web-based learning field. Because of the work I accomplished during my time with Kroger, I believe their web-based learning development process was significantly improved.

Technical Editing

My primary duty throughout my time in the WBL group was to edit the content of the web-based learning courses and application simulations. I based the majority of my editing practices on methodologies presented in Technical and Scientific Editing (ENG 693). I regularly drew from Hodges’ Harbrace Handbook (15th ed.) when developing the “WBL Text Standards” worksheet, which became the guideline for content development within the group. The fundamentals of my editing work for the WBL group mirrored the client projects that were required for the ENG 693 course. Having the practical experiences of working with clients, even in a classroom setting, was invaluable to my editing content for in-house clients at Kroger.

Having received formal instruction in editing provided me with the knowledge to defend the editing choices I made when presenting the edited documents to the clients. As discussed in Chapter 3, I regularly needed to present and defend the edits I made to each training course given the open-forum style of discussion used in each of the milestone meetings that I attended. All attendees, including clients and other WBL team members, were able to question current decisions and propose new ones. This practice required all decisions to be legitimately justified and mutually agreed upon. For my role in the group, I often had to provide justification ranging from particular word choice at a
low-level to presentation schemes at a high-level. Being able to cite specific rules was a common means of justifying my decisions made when editing course content.

**Instructional Design**

Instructional design was not a specified step in the course development process, but was instead used throughout those projects. Each time I evaluated an addition made to a course, I considered the user-centered design approach which was stressed in each of the MTSC courses. A goal of the WBL group was to create as much interactivity with the user as possible. Through the editing process, I was given the task of suggesting methods and places to enhance interactivity. I performed a needs assessment of the audience and determined the best ways to implement interactive items.

The interactive items would often require the users to provide an answer to a question posed to them. By participating in problem solving activities, the users become more connected with the material and are exposed to realistic situations that they may encounter when working through the training. Barker (2003) emphasizes the need for problem solving to better inform end users. He suggests that designers

> Encourage problem solving by suggesting options, encouraging creative solutions and thought-provoking suggestions, and generally letting the users know that the writer has anticipated their problems and can show them how to… solve them.  

(pp. 311)

When deciding upon an interactive exercise, the WBL group worked closely with the clients (and in some cases the subject matter experts) to select scenarios that the users would most commonly encounter. The inclusion of problem solving exercises supported the user-centered design approach that I followed when editing the content for each course.

As described in Chapter Three, each course also contains a pre- and post-quiz, which helps evaluate the users’ learning. Both quizzes contain the identical set of questions. The purpose of the quizzes is twofold: first, the users are given an indication of what ideas are going to be presented and what items to pay particular attention to; and second, the learning acquired by the users is recorded and evaluated. However, since both sets of questions are identical, the users are being informed at the beginning of the course the exact items that they need to know to pass the course. Once the users are
aware of the testing system either through word of mouth or after taking a few courses, the system could be abused and the value of the training lessened as a result. Even though the testing system was flawed, I revised the quiz questions to best represent the content.

While it was understood by the WBL group that the testing system was flawed, it was necessary to have a system in place to justify the need for the training to both the employees and the organization. Along with several other team members, I expressed a concern with the effectiveness of the testing system and several alternatives were being discussed as my internship came to a close. I sponsored the suggestion to eliminate the pre-quiz and work the questions into the content interactively. This revised system would require the users to be attentive throughout the course because there would be no guarantee of what items would be tested on in the post-quiz. Because the WBL group was always open to new ideas, I was given every indication that a change would be considered.

**Group Evolution**

The WBL group continually re-evaluates its practices in order to consistently deliver the best possible product. This self-evaluation spawns new development methods and evolving duties for group members. Morgan (1997) refers to organizations that continually adapt and evolve as organisms. Morgan claims that “The management of organizations can often be improved through systematic attention to the ‘needs’ that must be satisfied if the organization is to survive” (1997, p. 67). If organizations are not willing to continually analyze their processes and change those processes in order to improve themselves, those organizations will not survive. Based upon my studies in Organizational Communication (COM 619), I was able to draw many comparisons in terms of group dynamic and behavior between the organism metaphor Morgan uses to describe some organizations and the WBL group.

For example, after encountering issues with clients misunderstanding the course content development process, the WBL group re-evaluated the initial course design process. After analyzing group member and client input, we found that the clients were not given enough direction early in the process to correctly develop an initial draft of a course. Substantial text editing and excessive revisions were often the result of the
clients’ unfamiliarity with the development process. These additional revisions often required a greater time commitment from the client than was necessary. Also, clients were probably often frustrated by having to develop content with an insufficient amount of direction. If the WBL group repeatedly imposed this unnecessary time commitment and frustration onto its clients, current and future clients could potentially be lost.

After a re-evaluation of the clients’ needs, a milestone meeting for brainstorming was added to the course development process. The purpose of the new brainstorming session is to discuss general ideas for the course (themes, characters, etc.) and to provide direction on how to put together a draft of the course content. The addition of this meeting to the course development process is one example of the WBL group’s willingness to evolve when its environment (group/client interaction) required it to do so.

Morgan would refer to the WBL group’s constant re-evaluation as an “open systems” approach. Morgan (1997, p. 40) argues that “living systems are ‘open systems,’ characterized by a continuous cycle of input, internal transformation (throughout), output, and feedback (whereby one element of experience influences the next).” Given the relative newness of the WBL group, continuous changes of the group processes were being driven by both feedback from current clients and the need to promote the group within the company. The field of training in particular requires a constant re-evaluation of its practices to ensure that the users are provided with the most productive training possible.

**Personal Integration**

I clearly was not the first technical communicator to work for Kroger, but their expectations of what a technical communicator would contribute differed somewhat from what I personally contributed. When I first began working with the WBL group, their expectations of me were limited to my being a “wordsmith” who would be able to clearly express technical ideas to non-technical individuals. This expectation was valid, but was also limiting at the same time. It did not account for the design and management skills that a strong technical communicator possesses. Technical writers were thought to know the ins-and-outs of language and grammar, but not to have anything more to contribute in the overall development of a training product.
In the first few weeks, I lived up to the expectations of the group by editing the course content for several current projects. While not providing more universal contributions at this point, I gained significant recognition for the ways I was able to dramatically improve the usability of the course text by following practices such as leading with action words, using consistent naming and numbering schemes, and including audience-appropriate terms. In one instance, I edited a course that had already been reviewed and edited by several individuals. After reviewing my changes, the WBL group leader was surprised by the number of mistakes that had previously been missed and was impressed by my ability to consider so many different issues when reviewing a text.

As I became more comfortable with the operations and objectives of the WBL group, I hoped to become more involved in other areas of the group. In addition, the WBL group leader recognized my ability to contribute in other areas, so we mutually agreed to another set of tasks that I would become involved in, including editing the caption text for client-based application simulations, learning the RoboDemo software, developing my own application simulations, and developing the first WBL group newsletter. Through each of these tasks, I created new contacts within the organization and the value of a technical communicator became more recognized.

The ability to multitask became increasingly important as I was further integrated into the group. I had to prioritize my time based upon due dates for the various tasks. I maintained regular communication with the other WBL group members, clients, and subject matter experts. I ensured that I was sufficiently prepared for each of the growing number of meetings in which I was a participant. My new responsibilities required me to become proficient with various applications and operating practices used by the organization. By using in-house applications and reviewing defined best practices, I was able to collaborate more directly on the various tasks that I undertook.

By week ten, I was scheduling and leading text review and detailed design meetings, managing the course content for all new courses, and contributing to the entire course development lifecycle. I aided in implementing a new quality assurance step (technical review test) toward the end of the development process where an individual would rigorously test a course in an attempt to locate technical problems with the
application. I regularly participated in quality assurance because of my familiarity with the product and my educational background in software development. I was comfortable performing these tasks because of testing experience I obtained in classes such as Information Design (ENG 697) and Designing and Testing User Documents for Technical and Scientific Communicators (ENG 514).

My personal integration into the WBL group can be attributed to the acknowledgement of the diverse skills that I brought to the group. Undoubtedly, my undergraduate degree in Computer Science has prepared me for work in an information technology based environment. I came into the position with a general understanding of how the courses and simulations were constructed and what tools were used to create them. Of equal importance, however, was my ability to clearly communicate to my group members and our clients the value of user-centered design in all aspects of e-learning. It became apparent to the WBL group members that technical communicators can provide much more than just readable text. Technical communicators provide other skills such as content management, problem solving, and instructional design. They are able to clearly communicate their ideas to their peers and clients and can provide insight into creating user-centered instruction.

Limitations Working in the WBL Group

My internship working with the WBL group at Kroger was not without its limitations. As discussed in Chapter Three, my opinion often differed from that of some members of the WBL group and our clients in how thoroughly to explain topics in the training courses. As regularly stressed by members of the MTSC faculty, ideas need to be explained as thoroughly as possible to improve the learning of the users who do not have the benefit of viewing the courses multiple times. Having insufficient explanations of course objectives is the result of two factors: limited time for training and a lack of user analysis.

Unfortunately, time is often a constraint with the training courses as some clients want the shortest courses possible in order to minimize the number of employee hours devoted to training. This desire for short courses puts pressure on the WBL group members to remove as much information from the courses as possible in order to reach
A misunderstanding of the users’ needs by the WBL group and its clients can also be attributed to the removal of relevant content. I often impressed upon the other WBL group members that the typical users were from varying educational and professional backgrounds and that certain knowledge could not be assumed with our audience. My concern was often well received, but it did not always result in the inclusion of additional content. In situations where content had to be reduced, I did my best to make explanations as clear as possible in the space I was provided.

**Reflections on an Internship with the Kroger Company**

I concluded my internship with Kroger having accomplished two very significant goals: personal growth and modeling the importance of the technical communication profession. Everything about the internship had a “real-world” feel to it. I was working in downtown Cincinnati for a Fortune 500 company that is the largest grocery retail chain in the country. I helped develop educational materials that are used to train thousands of users across the country. I made significant contributions to a group and an organization that will have a permanent impact on how they develop products in the future. These are accomplishments that I will carry with me throughout my career.

In terms of personal growth, I learned a lot about myself and what I can contribute in a team environment. Having understood and fulfilled my role within the product development process showed that I was a committed team player. I also learned that I possess the confidence to take lead in areas such as content development where I know that I can excel. My leadership skills were evident in my organizing and leading of text review and detailed design meetings. My request to change the course testing system from the standard pre- and post-quiz format to a more interactive testing method displayed my critical thinking and problem solving skills. By developing action-oriented, constructive content in courses such as “Customer Service and Proper Bagging Techniques,” I demonstrated the strength of my instructional design skills. I earned the respect of my associates by showing a willingness to contribute and take on new tasks such as the development of ASims and the creation of the first WBL Newsletter. I was able to apply methods that I have learned both in school and in the workplace into an
arena that required input from multiple disciplines. In all, I was able to see how my background in computer science and my current learning in technical communication will enable me to take my career in any direction I want it to.

I believe that I educated my associates on the value of having a technical communicator as part of the team. I demonstrated that technical communicators have much more to contribute than providing low-level editing for documentation. It is my hope that my associates learned as much from me as I did from them. I leave the WBL group with the understanding that many of the initiatives such as the brainstorming sessions, the quality assurance testing, and the content editing standard practices might not have been implemented without my input. I also leave the group with a fuller understanding of technical communication and the value of my education in the MTSC program.
References


Recruitment Brochure. Internal Document at the Kroger Company.
Appendix A: Web-based Learning Best Practices
Intranet Support and Training (IST)

Overview

Effective training and accessible support information are vital in preparing new employees to become contributing members of the Kinger team. It is also useful in helping existing Kinger employees stay current on various information topics and procedures. One of the functions of the Intranet Support and Training group is to assist Kinger business groups in creating web-based learning (WBL) and/or application help for various business-related processes, applications, and tasks. The services provided by the IST group include:

- Providing instructional design expertise
- Helping business groups identify key learning objectives
- Working with business groups to create an effective instructional plan
- Assisting subject matter experts in gathering content information and organizing it in a format that is WBL compliant
- Developing WBL content or application simulations based on the specifications defined by the client business group
- Providing support and training for online help.

This page provides potential IST clients with an overview of information that will assist them in collaborating with the IST group on a training/help development project.

Support and Training Categories

The IST group offers assistance in developing support information in three categories. These categories are defined by the type of information they provide and how they are implemented. The table below provides a description of each category type as well as links to examples. Click on the category name for example projects:

<table>
<thead>
<tr>
<th>Information Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web-Based Learning Course (WBL)</td>
<td>Entire course, including assessment, delivered via the Intranet</td>
</tr>
<tr>
<td>Online Help</td>
<td>Help menus developed for a specific application that will be accessed via the Intranet</td>
</tr>
<tr>
<td>Application Simulator (WBL)</td>
<td>Software simulations and training for a particular application</td>
</tr>
</tbody>
</table>

What to Expect when Working with IST

To ensure a positive, efficient interaction with clients, the IST group has developed a detailed methodology that it follows when working through a project. This methodology encompasses all aspects of content development as well as project management. If you are considering a project with IST, it is a good idea to familiarize yourself with this methodology so that you will know what to expect.

Web-Based Learning Methodology Diagram

Web-Based Learning Requirements and Restrictions

Ease of use is often one of the most crucial factors in delivering effective training and/or support information. In an effort to deliver web-based learning projects as efficiently as possible, the following file size restrictions are observed when creating content for any learning course or application help project:

<table>
<thead>
<tr>
<th>Description of Content</th>
<th>File Size Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adobe PDF (*.pdf)</td>
<td>350Kb</td>
</tr>
<tr>
<td>MS Excel File (*.xls)</td>
<td>350Kb</td>
</tr>
<tr>
<td>Macromedia Flash File</td>
<td>500Kb</td>
</tr>
<tr>
<td>HTML Editor (*.htm)</td>
<td>N/A</td>
</tr>
<tr>
<td>Application Simulations</td>
<td>500Kb</td>
</tr>
<tr>
<td>Text File (*.txt)</td>
<td>350Kb</td>
</tr>
<tr>
<td>Typed</td>
<td>N/A</td>
</tr>
<tr>
<td>MS Word (*.doc)</td>
<td>350Kb</td>
</tr>
<tr>
<td>MS Word RFT (*.rtf)</td>
<td>250Kb</td>
</tr>
</tbody>
</table>

Graphic files (pictures or other images) will be optimized by IST. All graphics should be delivered electronically to IST.

* Because of current bandwidth limitations, video cannot be used in any web-based learning, online help, or application simulation projects.

What are my next steps

If after reviewing the Orientation Site you have any questions or would like to start a training project [CLICK HERE](#).
Appendix B: RoboDemo (Application Simulation) Best Practices
RoboDemo (Application Simulation) Best Practices

File Size
- The standard for ASim file size is no larger 500k. This will allow the ASims to run over the network efficiently at store level.

Screen Capture Size
- When taking screen captures, adjust the red capture box to 785 x 498. This allows the screen capture to appear at its best within the ASims.

Background Colors
- The background color on the windows desktop must be one-half black and one-half white.
- Position the screen capture box so that there is a small header in white at the top and a small header in black at the bottom. This allows space for navigation messages when developing the ASims.

Font Size
- A 16 pt. font should be used for the text within the captions so that they can be viewed easily.
- There may be times when a larger font can be used.

Caption Bubble
- The yellow Windows XP caption bubble is the standard for most ASim projects.
- Other caption types and colors can be used if needed.

Length
- In general, ASims should be no more than 2-3 minutes in length.
- An ASims may need to be broken into two separate ASims if it is either too large in terms of file size or content.

Playback Controls
- All simulations should include playback buttons so that the user can learn at their own pace instead of relying on the program to determine when to advance to the next screen.
- The DION DM playback controls should be used for all ASims.
- The playback controls should be positioned in the bottom right-hand corner of the screen.
Navigation Message
- The message “please press the Next button to continue” should appear after 3 seconds on all screens that contain a caption.
- Insert a pause after 4 seconds for all screens that have a caption.

Images
- Any types of images can be used, but consider how the ASim file size will be impacted.

Audio
- Due to network constraints, audio (other than mouse clicks) will not be used with the ASims.

Caption Placement
- Captions are typically placed at the top of the screen so that they do not block the view of the main portion of the screen. However, there will be cases where captions have to be placed on other areas of the screen depending on what is being displayed.
- Try to put only one caption per frame. Putting multiple captions on one frame can cause timing issues and can also complicate printing from the outline view.

Ways to Keep File Size of ASims Manageable
- Do not copy and paste a screen that already has a caption because the new screen will be much larger in size. Go into the application and take another screen capture if necessary.
- Cut out the address and/or navigations bars at the top of the Internet Explorer window if an ASim is being developed for a web application.
- Keep animation and other images added to the ASims at a minimum.
- Make the two color gradients on the title bar the same color.

Separating Caption from Action
Instead of having the caption and action on the same frame, separate them by creating two copies of the same screen. Place the caption on one frame and the action on the other. This can prevent RoboDemo from showing the action before the caption.
Appendix C: WBL Course Content Development Worksheet
# Web-Based Learning
Course Content Development Worksheet

**Course:**

**Date:**

**Module:** [list module title here]

**Sub-Objective(s) Covered:** [list sub-objectives here]

**Question(s) Addressed:** [add questions here]

<table>
<thead>
<tr>
<th>Outline Ref. #</th>
<th>Scene #</th>
<th>Describe what will happen in this scene Includes narration (text spoken, but not displayed)</th>
<th>List the specific text used in this scene</th>
<th>Notes</th>
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Appendix D: WBL Text Standards
WBL Text Standards

**Body Text**
Instruction Formats:
- Press the X key followed by the Y key.
- Or, Press the number X key followed by the (number) Y key.
- Ex: Press the number 2 key followed by the ENTER key.
- Select the “X” option by pressing the number Y key followed by the (number) Z key.
- Ex: Select the “Reports” option by pressing the number 3 key followed by the ENTER key.
- Input the value “X” and then press the Y key.
- Ex: Input the value “4.29” and then press the ENTER key.

Text Standards:
- Only use quotes for input values, menu options, and field names.
- Ex: “7”, “1.29”, “00004110”, “Item Qty” field
- Italicize any pressed buttons.
- Ex: ENTER, FUNC, u, 1
- Use “input” instead of “enter”.
- Ex: Input the value “4.29” into the Item Markdown field.

**Gray Instruction Box Text**
Instruction Format:
- [Click X and then click Y.]
- Or, [Click X and then click Y on the keypad.] (if the user is clicking on an RF handheld unit or similar device)

Text Standards:
- Italicize any user input.
- Ex: ENTER, 1.29, u

**Red Error Message Box Text**
Instruction Format:
- Please click the X key followed by the Y key on the keypad.
- Ex: Please click the 1 key followed by the ENTER key on the keypad.

Text Standards:
- Italicize any user input.
- Ex: ENTER, 1.29, u
**Capitalization Rules**

Capitalize course titles, document titles, screen titles, and specific institutions.
- Ex: CAO Basics, Sales and Loss Reports, Item Markdown Entry, Kroger's Produce Department

Capitalize any items which are capitalized in the screenshot.
- Ex: Enterprise Signs and Tags Main Menu

*Do not capitalize common nouns proceeded by an article (a, an, the) or a modifier (my, your, every).*
- Ex: your produce department

*Do not capitalize the words “process” or “program” unless they are part of the actual title.*
- Ex: Floral Upgrade process, Item Specific Markdown program.

*Do not capitalize the word “field” and do not capitalize field names unless they are capitalized on the screen.*
- Ex: quantity field, Item Markdown field

**Italicizing Rules**

Italicize actual button presses listed in all three text areas (body, instruction, error).
- Ex: 123, ENTER, ALPHA

*Do not italicize input values listed in the body text.*
- Ex: “4.29”, “1”

**Quotation Rules**

Use quotes on field input values, menu items, and field names listed in the body text.
- Ex: Input “1.29” into the “Item Markdown” field, Select the “estp” option.

*Do not use quotes for buttons, course names, program titles, or report titles.*
- Ex: ALPHA, CAO Basics, Item Specific Markdown Program, Audit Reports

*Do not use quotes for button presses or input values in either the gray instruction box text or in the red error message box text.*
### Fun Facts

- According to research conducted by IT View Trends, the demand for e-learning continued to grow over the past three years in spite of the struggling economy.
- Research firm IDC predicts that the e-learning market will grow from $6.6 billion in 2002 to $25 billion in 2006.
- Brandon Hall.com reports that 87.2% of chief learning officers, key decision makers, and thought leaders said “more” when asked if they will implement more, less, or the same amount of e-learning programs in their businesses in the future.

### What Is Web Based Learning?

Web Based Learning (WBL) is electronic training delivered online in the form of an interactive training course or application simulation. WBL has several advantages over traditional Instructor Led Training (ILT) including:

- An interactive learning environment that is more engaging to the user.
- A more economical option by removing travel and classroom instruction costs.
- A tracking system which allows managers to analyze employee learning.
- A more flexible alternative that allows employees to take the course at a time that is most convenient for them.

In addition to the visual elements included in the course, a narrator reads the text aloud to reinforce the training being presented.

The clients, SMEs, and the WBL development team meet several times and maintain regular contact during the development process in order to assure that a quality training course is developed. Each course undergoes thorough quality assurance testing before it’s release.

After an initial version of the course is developed, the client and SMEs meet with the WBL team to review the course content and suggest any revisions. Following the meeting, final adjustments are made to the course before it undergoes pilot testing. After completion, the course is released to the appropriate stores, divisions, warehouses, and/or manufacturing plants for employee training and support.

### Upcoming Releases

**Training Courses:**
- EAS - Greeters' Response
- ESET Introduction
- Floral Upgrade
- Team Specific Markdowns
- Kroger Fresh Challenge - Produce
- Neg Skills for Claims Res.
- STAR Introduction
- Shrink External Theft
- Slicer Safety

**Application Simulations:**
- CAO Plus
- ELMS Release 2
- KPIIS
- Net Claim Filing
- SIR Revisions
- Store Manager Workbench

**Help Creator Training:**
- Risk Management

### Trends in E-Learning

**Informal Learning**

Informal learning is a form of self-directed learning where the employees learn in their own environment, at their own pace, and at a time that’s most convenient to them. Simply put, informal learning lets the users in control. Users are drawn to informal learning because they are making the decision to learn.

Informal learning encourages employees to network with one another in order to find help and further their learning. The training modules themselves, serve the dual purpose of educating the employees and encouraging them to learn more beyond what is presented.

**E-Learning**

E-Learning is the perfect facilitator for informal learning since users are able to learn on their own time and can access the training materials from virtually anywhere. The users are able to spend more time with topics that they are unfamiliar with and less time with topics that they already understand.

### Quarterly Achievements

**Training Courses** (First quarter release):
- Shrink Internal Theft
- Kronos Basic Training
- CAO Intermediate Training

**Training Courses** (Second quarter release):
- Random Weight Markdowns
- TAA Clerks Critical Tasks

**Application Simulations** (First quarter release):
- ELMS
- ESET Host

**Help Creator** (First quarter training):
- ELMS
- ESET
- Kronos
- FCB

Would you like WBL to work for you? Contact the WBL project lead at andrea.bailey@kroger.com.
Appendix F: Publication Legal Consent Form
IV. Assurances from the Sponsoring Organization (SO)
Signature (below) of the internship mentor indicates agreement on the following six issues:

The sponsoring organization (SO) will pay the intern.
The SO's mentor will meet weekly to discuss the progress of the intern's work.
The SO will allow the intern to share samples of his/her work for the bagging course only with the committee and to publish samples in the internship report, a document available to the public through the Miami University Library. No other work done can be published or shared with individuals outside The Kroger Co.
The SO will provide the intern with an appropriate orientation to the organization.
The SO will evaluate the intern at five weeks by initiating a conversation between the mentor and the Chair of the internship committee.
The SO will evaluate the intern in writing at the end of the internship and share this evaluation with the intern's committee.

Jill Nelson
(Please type or print name)
For the sponsoring organization

Date: 6/1/04

V. Assurances from Intern
Signature (below) of the intern indicates agreement on the three following issues:

• That the work assigned for the internship period is consistent with his/her supplementary courses in the Plan of Study and with his/her professional goals.
• That he/she will perform the work specified in Item III.
• That he/she will write two progress reports (these can be transmitted by email) to be submitted during the fifth and tenth weeks describing the progress of the internship.

Christopher Denman
(Please type or print name)
Intern

Date: 6/1/04
Appendix G: Customer Service and Proper Bagging Techniques
Initial Course Content
# Web-Based Learning

## Course Content Development Worksheet

**Course:** Customer Service and Proper Bagging Techniques  
**Module:** [list module title here]  
**Sub-Objective(s) Covered:** [list sub-objectives here]  
**Question(s) Addressed:** [add questions here]

<table>
<thead>
<tr>
<th>Outline Ref. #</th>
<th>Scene #</th>
<th>Describe what will happen in this scene</th>
<th>List the specific text used in this scene</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Show Strive for 5 logo</strong></td>
<td>Welcome! This is your guide to Customer Service and Proper Bagging Technique</td>
<td>Introduction</td>
</tr>
</tbody>
</table>
|                |         | **During this course you will learn:**  | -How to Properly Bag Groceries  
-Which Items Don’t Need Bags  
-Don’t forget BOB  
-Best Practices  
-Customer Service | |
<p>|                |         | <strong>From beginning to end, the job of the Courtesy Clerk is all about Customer Service.</strong> | | |
| Pre-Quiz       |         | <strong>Let’s see how much you already know about bagging:</strong> | | |
|                |         | <strong>Please watch the following two scenes. One will show poor bagging techniques and the other correct bagging techniques. Following the scenes you will be asked to choose which is correct.</strong> | | |</p>
<table>
<thead>
<tr>
<th><strong>Scene 1</strong></th>
<th><strong>Scene 2</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Show sloppy Courtesy Clerk, chit-chatting with cashier, haphazardly tossing items into a bag, leaving something on bottom of Bascart, etc.&gt;</td>
<td>Show neat Courtesy Clerk, greet customer, and keep attention toward them. Show proper bagging, building walls, etc. Putting BOB stickers on large items and informing cashier of items in bottom of bascart.&gt;</td>
</tr>
<tr>
<td>Which scene showed proper customer service and bagging techniques? Scene 1 Scene 2</td>
<td></td>
</tr>
</tbody>
</table>

**How To Bag Properly**

- Fundamentals of building a proper bag
  - Build Walls…without forcing items down sides
  - Fill in the Middle…with heavier items such as canned goods
  - Crushables on top…eggs, chips, bread

- Items such as candy bars and Kool-Aid
<table>
<thead>
<tr>
<th>Packets should also placed in the bag on the top.</th>
</tr>
</thead>
</table>
| Other important points to remember:  
- Do not block handles  
- Bag wet and dry items separately  
  - Keep refrigerated and frozen together  
  - Keep hot deli items together  
- Keep like uncooked meat items together, i.e. beef with beef, chicken with chicken  
- Seasonal or specialty items that are breakable should also be treated with special care and may be put in their own bag. An example of this is Christmas mugs/dishes.  
- Do not bag cleaning products with food |
<table>
<thead>
<tr>
<th>These Items Don’t Need Bags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large items and items with handles don’t require a bag. These include milk, large bags of pet food, laundry detergent, cases of water</td>
</tr>
<tr>
<td>Unless the customer asks for a bag, use the BOB sticker.</td>
</tr>
<tr>
<td>Most bags should hold more than 5 items, however some bags may contain less than 5 items. Remember,</td>
</tr>
<tr>
<td>Using a BOB sticker</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Our ultimate goal is an average of at least <strong>FIVE ITEMS PER BAG!!</strong></td>
</tr>
<tr>
<td>Don't forget BOB…Bottom of the Bascart</td>
</tr>
<tr>
<td>The following section will cover Best Practices</td>
</tr>
<tr>
<td>Do Not Double Bag! (unless the customer asks)</td>
</tr>
<tr>
<td>-Build Walls…without forcing items down sides  -Fill in the Middle…with heavier items such as canned goods  -Crushables on top…eggs, chips, bread</td>
</tr>
</tbody>
</table>
| Plastic vs. Paper | The price of one paper bag can buy 5 plastic bags.  
*Plastic saves money!* |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Show visual of 1 paper = 5 plastic&gt;</td>
<td></td>
</tr>
</tbody>
</table>
| Always Ask: “IS PLASTIC OKAY?” | NEVER ASK “Paper or Plastic?”  
As discussed in the previous segment, plastic saves money. |
| ALWAYS honor the customer’s preference  
If someone asks for paper, use it without question | |
| Report Defective Bags | Problems with bags should be reported to your supervisor.  
Stores receive credit for defective bags.  
Please report bags with defective handles, seams, and visible holes.  
Also report bags that do not open properly.  
Save Money! |
| Customer Service | Greet customers with a smile.  
Be friendly, courteous, and helpful.  
No chatting with cashier about events unrelated to the customer. |
<p>| Help unload bottom of the Bascart. | |</p>
<table>
<thead>
<tr>
<th><strong>Some items may be too heavy for the customer to lift. Inform the cashier as to what is in the bottom of the Bascart.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is Plastic Okay?</strong></td>
</tr>
</tbody>
</table>
| **Properly bag the order** | - Build Walls…without forcing items down sides  
- Fill in the Middle…with heavier items such as canned goods  
- Crushables on top…eggs, chips, bread |
| **Load the Bascart with care** | Be sure to put heavier bags toward the bottom of the Bascart so as not to crush items such as bread and eggs. |
| **Thank the Customer** | Offer to help the customer out to their car. Thank them and wish them a nice day. |
| **Congratulations on completing this course on Customer Service and Bagging.** | Remember: Strive for 5 Items Per Bag!! |
| **Post-Quiz** | Conclusion |
Appendix H: Customer Service and Proper Bagging Techniques
Sample Storyboard Scene
Web-Based Learning
Course Storyboard Worksheet

Course: Bagging

Section: 
Module: 
Scene: ZA

Notes/Special Instructions:
KEEP
TEXT
ON
SCREEN
YES

Sketch scene layout below:

1. Character Still on Screen
2. Character ZAA
3. Conv. Belt Opens
4. Character-ZA-B-ZA-F as he says item with text (comes down)
5. Conv. Belt & Stacks-Up

Learner Use: [describe what will happen on this screen]

Content Inventory:

<table>
<thead>
<tr>
<th>Text Items</th>
<th>Narrated (y/n)?</th>
<th>Media Files</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Hyperlink Inventory

<table>
<thead>
<tr>
<th>URL</th>
<th>Shown as...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

On-screen Navigation: [if standard, write "standard," if different, please describe]

Revised February 6, 2004
Appendix I: Customer Service and Proper Bagging Techniques Final Course Content
**Web-Based Learning**  
Course Content Development Worksheet

**Course:** Customer Service and Proper Bagging Techniques  
**Date:** 8/19/04  
**Module:** [list module title here]  
**Sub-Objective(s) Covered:** [list sub-objectives here]  
**Question(s) Addressed:** [add questions here]

<table>
<thead>
<tr>
<th>Outline Ref. #</th>
<th>Scene #</th>
<th>Describe what will happen in this scene includes narration (text spoken, but not displayed)</th>
<th>List the specific text used in this scene</th>
<th>Notes</th>
</tr>
</thead>
</table>
| I.A/B          | 1       | **New Section: Introduction**  
Include customer first logo  
Welcome to the Customer Service and Proper Bagging Techniques training course!  
Our customers always come first. Providing excellent service enhances our customers’ shopping experience and makes them want to return.  
This course will present to you excellent customer service techniques, including proper bagging. | **Reversed text in intro. sentence to emphasize cust. service.** |
| I.C            | 2       | This course will teach you about the following customer service objectives:  
• Bagging items properly  
• Understanding |


which items do not need to be bagged
- Remembering bottom of bascart items
- Defining best practices

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Before getting started, let’s see how much you already know about providing excellent customer service.</td>
<td></td>
</tr>
<tr>
<td>II.</td>
<td>Pre-Quiz</td>
<td>** We can use this scene as an overview of the entire bagging/customer service process. This can be used as a form of pre-quiz. It can include everything from the customer entering the checkout until he/she leaves the store. Show improper double bagging, use of BOB stickers, being unfriendly, etc.</td>
</tr>
<tr>
<td>II.</td>
<td>7a</td>
<td>The job of the courtesy clerk is all about customer service. You provide excellent customer service by being friendly to the customers, as well as properly bagging their items.</td>
</tr>
<tr>
<td>VI.A/B</td>
<td>7b</td>
<td>Always greet customers with a smile. Be friendly,</td>
</tr>
</tbody>
</table>
| III. | 8a | New Section: Properly Bagging Items | Proper bagging techniques using the plastic bag

First, **build walls** in your bag without forcing items down the sides.

Second, **fill in the middle** of the bag with heavier items such as canned goods.

Lastly, **place crushable items on top**. This includes eggs, bakery items, snacks, and candy bars.

Follow these three steps to ensure that your bags are built properly and have an even weight distribution. | **Use first sentence as heading.** |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8b</td>
<td>&lt;Interactive Scene: User clicks on items as they come through checkout. Simulates proper bagging.&gt;</td>
<td><strong>Moved from scene 15.</strong></td>
<td></td>
</tr>
</tbody>
</table>
| III. | 9 | • Do not block bag handles
    • Bag wet and dry | |
| III. | 10 | Plastic bags are strong enough to hold many items. When bagged properly, a plastic bag will stand on its own.  

Most bags can contain as many as 8 or 10 items. However, even when following proper bagging rules, some bags may only contain a few items.  

Make sure that bags are not packed too heavy. |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Removed: Be sure to watch the weight distribution and</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>IV.</td>
<td>11</td>
<td><strong>New Section: Items that Don’t Need Bags</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Large items and items with handles don’t require a bag. These items include: milk, large bags of pet food, laundry detergent, cases of pop. Keep in mind that there are many other items that do not require bags.</td>
</tr>
<tr>
<td>IVa.</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unless the customer asks for a bag for a large item, place the bottom of bascart, or PAID, sticker on the item.</td>
</tr>
<tr>
<td></td>
<td>13</td>
<td><strong>&lt;Interactive Scene: User identifies items that don’t need bags.&gt;</strong></td>
</tr>
<tr>
<td>IVb.</td>
<td>14</td>
<td><strong>New Section: BOB</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>&lt;show courtesy clerk assisting cashier&gt;</strong></td>
</tr>
<tr>
<td>V.</td>
<td>16</td>
<td><strong>New Section: Best Practices</strong></td>
</tr>
<tr>
<td>V.A</td>
<td>17</td>
<td>Don’t Double Bag</td>
</tr>
</tbody>
</table>
items unless the customer asks you to.

The bags are strong and will hold up when built correctly.

Double bagging should not be necessary if you follow proper bagging techniques.

<table>
<thead>
<tr>
<th>V.B 18</th>
<th>Use Plastic Bags When Possible</th>
<th>Use plastic bags as often as possible. Five plastic bags cost the same as one paper bag. Remember, plastic saves money!</th>
</tr>
</thead>
<tbody>
<tr>
<td>V.C 19a</td>
<td>Is Plastic OK?</td>
<td>Always ask the customer, &quot;Is plastic OK?&quot; This question typically results in a positive response from the customer. However, <strong>always</strong> honor the customer's preference. If someone asks for paper bags or even double bags, use them without question.</td>
</tr>
<tr>
<td>19b</td>
<td>Help Customers Unload Heavy Items</td>
<td>Some items may be too heavy for the customer to lift. Help the customer unload heavy items and bottom of the bascart items. Besides providing excellent customer service, <strong>moved from customer service section.</strong></td>
</tr>
<tr>
<td>Section</td>
<td>Number</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>you will assist the cashier and make sure your store gets credit for these purchases.</td>
<td>19c</td>
<td>Load the Bascart with care</td>
</tr>
<tr>
<td>V.D</td>
<td>20</td>
<td>Report Defective Bags</td>
</tr>
<tr>
<td>VI.A/B</td>
<td>21</td>
<td>New Section: Customer Service</td>
</tr>
<tr>
<td>VI.C</td>
<td>22</td>
<td>Help Customers Unload Heavy Items</td>
</tr>
<tr>
<td>VI.D</td>
<td>23</td>
<td>Is Plastic OK?</td>
</tr>
</tbody>
</table>
plastic OK?" However, always honor the customer's preference.

| VI.E  | 24 | Properly bag the order | Remember to follow these key techniques when bagging an order:  
• Build walls  
• Fill in the middle  
• Place crushables on top  
• Watch the weight distribution  
• Don't pack the bags too heavy  
• Always bag like items together |
|VI.G  | 26 | Thank the Customer | Be sure to thank the customer and wish him/her a nice day. |
|VII.  | 27 | Conclusion | Congratulations! You have completed the Customer Service and Proper Bagging Techniques training course.  

Remember, the customer comes first. Proper bagging of customer purchases is an essential part of customer service. If the customers are happy with the service they received, chances are that they will return. |
|VII.A | 28 | In this course, you | |
have learned about the following customer service objectives:

- Understanding how to properly bag items
- Understanding which items do not need to be bagged
- Remembering bottom of bascart items
- Defining best practices

And remember our goal: Strive for five items per bag!

It’s time to see how much you have learned today. Your scores are being recorded. Good luck!

Post-Quiz