ABSTRACT

A TECHNICAL WRITING INTERNSHIP IN INSTRUCTIONAL DESIGN AT ACCENTURE LEARNING

by Dora K. Wheeler

From March 23, 2009 to July 3, 2009, I completed a technical writing internship in instructional design at Accenture Learning’s Chicago Content Development Center. This report describes my internship experience in four chapters. In Chapter 1: Introduction to Accenture Learning, I provide background information on Accenture Learning and explain my roles and responsibilities during the internship period. Chapter 2: Internship Overview describes my main internship projects, including the purpose, audience, deliverables, key tasks, and outcomes. In Chapter 3: Developing the Chart of Accounts eBriefing Course, I describe the complete process I followed to develop a web-based training course. In Chapter 4: Reflections on Instructional Design and Technical Communication, I introduce Robert Gagné’s Nine Events of Instruction and explain how I applied this theory to my internship projects. Finally, I reflect on the technical communication guidelines that prepared me for a career in training development.
A TECHNICAL WRITING INTERNSHIP IN INSTRUCTIONAL DESIGN
AT ACCENTURE LEARNING

An Internship Report

Submitted to the

Faculty of Miami University

in partial fulfillment of

the requirements for the degree of

Master of Technical and Scientific Communication

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# Table of Contents

## Chapter 1: Introduction to Accenture Learning ........................................... 1

- Introduction to Accenture Learning .................................................................................................................. 1
- Organization .......................................................................................................................................................... 1
- Clients ................................................................................................................................................................. 2
- Culture ............................................................................................................................................................... 3
- Training Products ............................................................................................................................................... 4
- Instructor-Led Training (ILT) ............................................................................................................................... 5
- Web-Based Training (WBT) ................................................................................................................................. 6
- My Roles and Responsibilities ......................................................................................................................... 7
- Instructional Design Senior Analyst ................................................................................................................. 7
- Temporary Writing Resource ............................................................................................................................. 8

## Chapter 2: Internship Overview ................................................................. 10

- Preface ............................................................................................................................................................... 10
- Internship Projects Overview .......................................................................................................................... 12
- Accenture Human Resources Compensation Tool ........................................................................................... 13
- Project Overview ............................................................................................................................................... 14
- Major Project Tasks .......................................................................................................................................... 14
- Analysis Phase Deliverables ............................................................................................................................. 14
- Design Phase Deliverables ............................................................................................................................... 15
- Production Phase Deliverables ......................................................................................................................... 16
- Project Outcomes ............................................................................................................................................... 17
- Business Automobile Revisions ...................................................................................................................... 17
- Project Overview ............................................................................................................................................... 17
- Major Project Tasks .......................................................................................................................................... 17
- Project Administration ..................................................................................................................................... 18
- Training Development ..................................................................................................................................... 19
- Project Outcomes ............................................................................................................................................... 21
- Medicare Reporting Training ........................................................................................................................... 22
- Project Overview ............................................................................................................................................... 22
- Major Tasks ....................................................................................................................................................... 22
- Project Administration ..................................................................................................................................... 22
- Training Development ..................................................................................................................................... 23
- Project Outcomes ............................................................................................................................................... 24
- Chart of Accounts Training ............................................................................................................................... 25
- Project Overview ............................................................................................................................................... 25
- Major Tasks ....................................................................................................................................................... 25
- Project Outcomes ............................................................................................................................................... 26

## Chapter 3: Developing the Chart of Accounts EBriefing Course... 28

- Project Background ............................................................................................................................................ 28
- Planning Phase .................................................................................................................................................... 29
- Reviewing Project Documentation .................................................................................................................. 29
<table>
<thead>
<tr>
<th>Formulating Initial Questions</th>
<th>31</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewing Product Description and Samples</td>
<td>32</td>
</tr>
<tr>
<td>Reviewing Client-Specific Templates and Standards</td>
<td>32</td>
</tr>
<tr>
<td>Design Phase</td>
<td>33</td>
</tr>
<tr>
<td>Initial Draft of Instructional Design Map</td>
<td>33</td>
</tr>
<tr>
<td>SME Kick-Off Meeting</td>
<td>35</td>
</tr>
<tr>
<td>Revision and Review Cycle</td>
<td>36</td>
</tr>
<tr>
<td>Production Phase</td>
<td>38</td>
</tr>
<tr>
<td>Initial Build</td>
<td>38</td>
</tr>
<tr>
<td>SME Review</td>
<td>42</td>
</tr>
<tr>
<td>Audio Recording and Integration</td>
<td>42</td>
</tr>
<tr>
<td>Final Pre-Pilot Review</td>
<td>42</td>
</tr>
<tr>
<td>Acceptance Phase</td>
<td>43</td>
</tr>
<tr>
<td>Pilot Test</td>
<td>43</td>
</tr>
<tr>
<td>Internal Acceptance Testing</td>
<td>43</td>
</tr>
<tr>
<td>Deployment Phase</td>
<td>43</td>
</tr>
</tbody>
</table>

**CHAPTER 4: REFLECTIONS ON INSTRUCTIONAL DESIGN AND TECHNICAL COMMUNICATION**

Gagné’s Nine Events of Instruction | 45 |
Application at Accenture Learning | 45 |
Application during My Internship | 47 |
Event 1: Gain Attention | 48 |
Event 2: Inform Learners of Objectives | 49 |
Event 3: Stimulate Recall of Prior Learning | 50 |
Event 4: Present the Content | 51 |
Event 5: Provide Learning Guidance | 52 |
Event 6: Elicit Performance and Event 7: Provide Feedback | 53 |
Event 8: Assess Performance | 54 |
Event 9: Enhance Retention and Transfer to the Job | 55 |

Concluding Thoughts on Gagné | 56 |
Instructional Design and Technical Communication Parallels | 56 |
**Technical Communication Skills Applied to Instructional Design** | 56 |
Process for Developing Deliverables | 56 |
Persuasive Strategies | 59 |
Client and SME Communications | 60 |
Writing Quality | 60 |

**Instructional Design-Specific Skills I Developed** | 61 |
Writing Style and Deliverable Formats | 61 |
Scenarios and Case Studies | 62 |
Development Tools | 62 |
Final Reflection | 62 |

References | 63 |
Appendix A – Report Acronyms | 64 |
Appendix B – Accenture Compensation Tool Design Phase Deliverables | 65 |
<table>
<thead>
<tr>
<th>Appendix C – Compensation Tool User Guide Template</th>
<th>68</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appendix D – Business Automobile Revisions Assessment</td>
<td>71</td>
</tr>
<tr>
<td>Appendix E – Medicare Reporting Demonstration Guide</td>
<td>76</td>
</tr>
<tr>
<td>Appendix F – Chart of Accounts ILT Materials Sample</td>
<td>79</td>
</tr>
<tr>
<td>Appendix G – Chart of Accounts eBriefing Feedback Form</td>
<td>85</td>
</tr>
<tr>
<td>Appendix H – Chart of Accounts eBriefing Final Course</td>
<td>88</td>
</tr>
<tr>
<td>Appendix I – My Application of the Nine Events of Instruction</td>
<td>112</td>
</tr>
</tbody>
</table>
LIST OF TABLES

Table 1: Overview of the CDC Content Development Process............................................... 10
Table 2: Key Sections of the Preliminary Learning Brief.......................................................... 30
Table 3: Gagné’s Nine Events of Instruction and CDC Application .......................................... 46
Table 4: Anderson’s Problem-Solving Model and the CDC Development Process.............. 57
# List of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Content Development Center Organization Chart</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>Approximate Project Timeline</td>
<td>13</td>
</tr>
<tr>
<td>3</td>
<td>Main Task and Variations</td>
<td>15</td>
</tr>
<tr>
<td>4</td>
<td>Portion of Project Work Plan</td>
<td>18</td>
</tr>
<tr>
<td>5</td>
<td>Original Menu Slide</td>
<td>20</td>
</tr>
<tr>
<td>6</td>
<td>New Menu Slide</td>
<td>20</td>
</tr>
<tr>
<td>7</td>
<td>Portion of Demonstration Guide</td>
<td>24</td>
</tr>
<tr>
<td>8</td>
<td>Process Overview Section in the Outline</td>
<td>34</td>
</tr>
<tr>
<td>9</td>
<td>Process Overview Section in the Instructional Design Map</td>
<td>34</td>
</tr>
<tr>
<td>10</td>
<td>Sample Question Log</td>
<td>37</td>
</tr>
<tr>
<td>11</td>
<td>Course Slide in PowerPoint</td>
<td>39</td>
</tr>
<tr>
<td>12</td>
<td>Assessment Question in Quizmaker</td>
<td>40</td>
</tr>
<tr>
<td>13</td>
<td>Published Course Slide in Articulate</td>
<td>41</td>
</tr>
<tr>
<td>14</td>
<td>Event 1 Example from Chart of Accounts eBriefing</td>
<td>48</td>
</tr>
<tr>
<td>15</td>
<td>Event 2 Example from Compensation Tool User Guide</td>
<td>49</td>
</tr>
<tr>
<td>16</td>
<td>Event 3 Example from Medicare Reporting ILT</td>
<td>50</td>
</tr>
<tr>
<td>17</td>
<td>Event 4 Example from Chart of Accounts eBriefing</td>
<td>51</td>
</tr>
<tr>
<td>18</td>
<td>Event 5 Example from Chart of Accounts ILT</td>
<td>52</td>
</tr>
<tr>
<td>19</td>
<td>Event 6 and 7 Example from Chart of Accounts ILT</td>
<td>53</td>
</tr>
<tr>
<td>20</td>
<td>Event 8 Example from Business Automobile Revisions</td>
<td>54</td>
</tr>
<tr>
<td>21</td>
<td>Event 9 Example from Chart of Accounts ILT</td>
<td>55</td>
</tr>
</tbody>
</table>
CHAPTER 1: INTRODUCTION TO ACCENTURE LEARNING

This internship report describes my experience as a technical writing intern for Accenture Learning. This unique internship experience required me to apply my technical and scientific communication skills to a variety of training development and documentation projects. I completed this internship at Accenture Learning’s Chicago Content Development Center from March 23 to July 3, 2009. As I am a permanent employee of Accenture Learning, I completed this internship in conjunction with my regular position as an Instructional Design Senior Analyst.

In the first chapter of this report, I introduce the Accenture Learning organization, describe its key services and product offerings, and explain my role as a training developer.

Introduction to Accenture Learning

Accenture Learning (AL\(^1\)) is one small part of Accenture LLC, a global management consulting, technology services, and outsourcing company with over 170,000 employees and offices in 52 countries. Accenture Learning is part of Accenture’s Human Resources (HR) and Learning Business Process Outsourcing (BPO) unit. This unit of the company offers a variety of training products and services to other groups within Accenture and to external clients (other companies).

Within Accenture Learning, there are still more divisions among groups that sell, create, and deliver training products and services to clients. The Chicago Content Development Center (CDC) is the specific group within Accenture Learning to which I belong. The Chicago CDC is one of six CDCs globally, and its team is responsible for planning, designing, writing, and building training materials. Other CDCs are located in Denver, San Antonio, Brisbane (Australia), Yarnfield (UK), Bangalore (India), and Mumbai (India) (Accenture Learning New Joiner Training Team, 2006).

Another group that I worked with during the internship period was the Business Support Services team, a separate group from Accenture Learning that works out of the same location. This group develops and delivers technology solutions that relate closely to training and other HR-related functions, including computer applications for monitoring and managing training,

\(^1\) This report includes a number of Accenture Learning and instructional design acronyms. Appendix A provides a complete list of these acronyms as a reference.
employee performance, and compensation (Anonymous, 2010). Accenture Learning functions separately from the Business Support Services group; however, during the internship period, the Chicago CDC Director assigned me to this group as a temporary writing resource.

**Organization**

For the purposes of this report, I focus on the basic organization of the Chicago CDC. Figure 1 on Page 3 shows the high-level organization. The Chicago CDC Director manages all of the learning contracts that the CDC will fulfill and is ultimately responsible for staffing decisions. Under the Director, the CDC is organized into three main groups: development, media/graphics, and operations (Accenture Learning New Joiner Training Team, 2006).

- **Development:** The development group includes the training developers that work directly with client stakeholders and SMEs to create the training products. The group includes managers, leads, and analysts:
  - *Instructional Design Managers (IDMs)* manage the client relationship, oversee the project team, and develop budgets and schedules to guide the development process. While not always closely involved in the development work, IDMs are ultimately responsible for the success of the overall project.
  - *Instructional Design Leads and Senior Leads (IDLs)* directly supervise the instructional designers assigned to a specific project and guide the team to meet project deadlines. IDLs also complete detailed quality assurance reviews on all deliverables before sending these to the client for reviews or final sign-off.
  - *Instructional Design Analysts and Senior Analysts (IDAs)* complete the actual training design and development for a project. Senior Analysts require little supervision by the IDL and, in some cases, may take on the IDL role for a project. My primary role, Instructional Design Senior Analyst, is shown in white in Figure 1.

- **Media/graphics:** This group works closely with the development group during training design and development. The media team records course audio and creates video components for high--end courses. The graphics team supports the instructional designers in selecting and creating graphics to include in courses.
• **Operations:** This group oversees the processes, templates, and other standards that the
development and media/graphics teams use when creating training. After updating
processes or templates, this group communicates the changes to the rest of the CDC.
Like the development team, media/graphics and operations include managers, leads, and
analysts.

![Figure 1: Content Development Center Organization Chart](image)

**Clients**

Accenture Learning’s largest “client” is Accenture itself. When the group was first
established, it only created training for other groups within Accenture. Over the past decade,
AL’s services have expanded to include external client work, but internal Accenture training still
remains a significant portion of the training that we develop. Although the training sponsors for
internal projects are part of the same organization, we still consider them “clients” and the
methods of working with internal sponsors and subject matter experts (SMEs) mirror the way we
work with these individuals from external organizations.

AL’s external clients are large companies from a wide range of industries, including
retail, insurance, finance, defense, and information technology. Often AL contracts stem from
prior or ongoing consulting work by Accenture’s consulting workforce. For example, a company
may hire an Accenture consulting team to help improve a specific business process. The
Accenture consultants may recommend a variety of process changes that impact roles, responsibilities, and technology. As part of implementing the recommended change management activities, the company will need to train its employees on new processes and systems. At this point, the Accenture consultants direct the client to Accenture Learning as a resource for developing this training. External projects are typically high profile, as they bring in relatively larger amounts of revenue when compared with internal training.

**Culture**

In describing the corporate culture of Accenture Learning, I focus on the Chicago CDC and aspects of the culture that I observed first-hand. The Chicago CDC culture focuses on the following components:

- **Efficiency:** The CDC’s content development is very process-focused. At the core of our processes is the “one-to-many” or “factory” model of content development. Under this model, we seek to optimize efficiency by applying standard, clearly-defined product types, templates, and treatments to a variety of clients and training needs. The one-to-many model makes it easier for sales staff and project managers to price and plan training projects accurately. We expect courses of the same product type to include the same types of instructional design treatments and cost roughly the same amount of money to create. Standard product types and templates also help to speed development time, as instructional designers can repurpose and build upon training best practices and samples that have worked well for similar clients and situations.

- **Value creation:** One of Accenture’s core values is client value creation – ensuring that our products and services provide measurable value and meet or exceed client expectations. While the one-to-many model emphasizes the use of standard product types and templates to increase efficiency, the CDC’s training development processes are continually evolving to increase client satisfaction. When standard product types do not meet a specific client’s needs, the CDC works with the client to adapt our offerings. CDC training developers have to stay up-to-speed on these changes and adapt their instructional design approaches accordingly.

- **Resource flexibility:** CDC resources may work with many different clients, including external companies and internal groups. Due to factors such as budget issues or system development delays, projects may start and stop suddenly. To minimize the amount of
resource downtime, managers often share resources across clients and projects. As such, training developers must be prepared to adapt to short or long-term staffing changes. The standard product types and templates that I described earlier facilitate these transitions. Although staffing is subject to change, the CDC has some unofficial, established project teams, particularly on long-term internal client projects. On the external client side, projects are typically short-term and teams fluctuate; however, some managers have a small group of developers that they request for their projects when possible.

- **Collaboration:** Across the CDC, collaboration is key. Employees document best practices and new instructional design ideas so that others can adapt them. The operations team coordinates periodic forums for CDC training developers to demonstrate their training courses and share tips for working with various development tools.

**Training Products**

The training products that Accenture Learning develops range from low to high-end. The products that we create for a particular training project depend on a number of factors including the training content, the client’s method of delivering training, and the client’s training budget. For each product type, the CDC has specific guidelines for the length of the courses and the types of graphics and other treatments that fit the project budget.

Most CDC training deliverables fit into two main categories – instructor-led training (ILT) and web-based training (WBT).

**Instructor-Led Training (ILT)**

In ILT training, one or more instructors present the course content to learners. Usually ILTs take place in a traditional classroom setting, but instructors may also conduct these courses virtually via web conference. ILT courses range from a single 1-hour session to multiple sessions spanning several weeks. The materials that instructional designers create as part of ILT development include PowerPoint presentations, participant and instructor guides, checkpoint questions, demonstration and practice exercises, group activities and role play scenarios, videos, graphics, and job aids.

Here are two examples:

- **Low-end:** When developing process training led by an expert instructor, the CDC delivers a basic PowerPoint presentation with minimal instructor notes to guide the
The course is 90% lecture with 10% simple activities, such as discussion questions.

- **High-end:** The CDC offers application training that teaches end-users how to perform detailed transactions required by their roles using realistic business scenarios. The course includes hands-on exercises in a practice training environment. The end deliverable is a single PowerPoint presentation that acts as a combined presentation pack, participant guide, and instructor guide. The training is a mix of 60% lecture/discussion and 40% activities and covers both business processes and related system transactions.

**Web-Based Training (WBT)**

WBT is online, self-study training that we typically deliver through a web application called a learning management system or LMS. Unlike ILT training, which relies on the instructor’s experience or presentation style to enhance the training, WBTs are self-contained. WBTs may be brief sessions that the learner completes in one sitting or may be several hours long. The materials that instructional designers create as part of WBT development may include course slides, audio scripts, checkpoint questions, scenarios, simulations, videos, graphics, and job aids.

Here are two examples:

- **Low-end:** In one of the simplest WBT offerings, the CDC creates WBTs by converting a client’s existing ILT course for online delivery. This conversion involves only minimal changes to content, verbiage, and instructional design treatments to ensure that the course is readable online.

- **High-end:** High-end web-based training includes many interactions to support and reinforce the course content. These interactions may include custom animations, video, checkpoints, and audio. The course may include complex application simulations, where learners view demonstrations and practice system steps in a simulated computer application.

The CDC also offers a number of smaller learning assets, including standalone job aids, assessment tests, and application simulations.

It is important to understand the target deliverables from the start of development because each training project is based on a contract to create a certain product type. If we do not deliver a course that meets the specifications of the product the client purchased, this can harm the client.
relationship or result in financial losses for Accenture. For example, assume that a client purchased a two-hour, high-end WBT course with a number of Flash animations. If we delivered a course that was one-hour long and included only static graphics, we have not delivered to the client’s expectations. The client paid for a more expensive course and would likely demand a partial refund. On the other hand, the client may ask us to develop a longer or more expensive course than they actually purchased. Scope creep happens frequently, and part of the IDA’s job is to alert the IDL and IDM if the client is asking for more than we agreed to develop. For example, if the client keeps adding new content topics to a course, the course length may grow beyond the duration specified in the contract. If the client purchased one hour of training, and we deliver two hours for the same price, then Accenture will likely lose money.

My Roles and Responsibilities

During the internship period, I performed two roles. For the training projects that I developed for the Chicago CDC, I held my current role as an Instructional Design Senior Analyst. I also worked for the Business Support Services group as a temporary writing resource.

Instructional Design Senior Analyst

As an Instructional Design Senior Analyst, my role was to outline, design, write, and build training courses with minimal supervision. I worked closely with the client and subject matter experts to turn rough outlines of courses into polished training materials. Specific responsibilities for the role included:

- Complete a thorough audience analysis to understand specific training needs.
- Develop a basic understanding of the subject matter through source materials and individual research.
- Interview and gather content from SMEs and stakeholders.
- Integrate module content, materials, and media to meet design specifications.
- Review course materials to confirm that the course will meet the learning objectives.
- Review deliverables for completeness, compliance with standards, and quality prior to sending for review.

For two of my internship projects, I held the dual role of IDA and IDL, meaning that I completed the design and development work for the projects and also had the primary
responsibility for reviewing my own work and completing administrative tasks such as leading calls with clients, drafting work plans, reporting status, and estimating work effort.

**Temporary Writing Resource**

I also worked as a temporary writing resource for the Business Support Services group. As I mentioned earlier, this group focuses on developing and delivering HR-related technologies.

The CDC and Business Support Services do not regularly share resources. In my case, the opportunity arose because training work was slow for the CDC, while the Business Support Services group was very busy. Rather than keep CDC resources underemployed, the groups established a partnership where CDC resources would assist the Business Support Services team in writing technical documentation and other deliverables related to their technology development projects.

As a writing resource, I worked closely with a functional architect within the Business Support Services group. The functional architect defines the basic configuration and requirements for a technology offering. In this case, the documentation that I worked on related to the Accenture Compensation Tool, an application that automates processes for administering pay increases and other compensation-related updates.

My role was a catchall position, where I helped the functional architect collect information and write a variety of documents describing the analysis and design of the system requirements. My specific responsibilities included:

- Interview business stakeholders and developers to determine:
  - The business processes behind the system
  - The desired system requirements
  - The actual system capabilities
  - Whether customizations to the system could help to bridge any gaps between requirements and capabilities
- Create supporting documents on a variety of topics using standard templates and samples from other projects.
- Solicit review feedback on the requirements from a large group of reviewers and incorporate their suggestions into the final deliverables.

This chapter provided background information to help you understand Accenture Learning’s Chicago CDC and the roles that I held during the internship period. In Chapter 2:
Internship Overview, you will learn about the major tasks that I completed in both the IDA and writing resource roles. In Chapter 3: Developing the Chart of Accounts eBriefing Course, I describe one project in detail as I worked through the phases of the CDC content development process. Finally, in Chapter 4: Reflections on Instructional Design and Technical Communication, I describe how I applied a popular instructional design model to my projects and analyze the parallels between instructional design and technical communication processes and guidelines.
CHAPTER 2: INTERNSHIP OVERVIEW

In this section, you will learn about the key projects that I worked on during the internship period. I begin by outlining my internship activities at a high level, including the approximate timeframes for each major project. Next, I describe each project in more detail, providing background information and describing the specific tasks I completed.

Preface

While many of the activities I completed during the internship period were consistent with my typical job activities as an instructional designer, my experience definitely reflected the economic downturn occurring at the time of the internship. Some projects that I was originally assigned to prior to the start of the internship did not materialize due to changes in the clients’ budget priorities. Other training projects that I worked on during the internship followed a modified process to cut costs or stopped at various stages of development due to budget concerns. Fewer full-time training projects also meant that the CDC was looking for creative ways to keep its employees fully occupied. Because of this, the CDC “loaned” my writing skills to the Business Support Services group as a temporary writing resource. This type of work is not a normal part of my IDA role.

Most CDC training development projects follow an established process called the content development process, which includes Planning, Design, Production, Acceptance, and Deployment phases – each with standard process steps and deliverables. Table 1 summarizes the process, including expected deliverables at each stage. I reference process phases in this chapter where applicable; however, the projects I worked on did not completely follow the process.

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<thead>
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<th>Phase</th>
<th>Description</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Planning</td>
<td>IDM and IDL work with the client to establish the training needs, target audience, product types, scope, and expectations for the working relationship. Depending on the project, the IDA may also participate in planning meetings to ask initial questions.</td>
<td>• Preliminary Learning Brief (PLB) – Document that functions as a contract for the training development, setting expectations for what the CDC will develop. Includes the course learning objectives around which the IDA will structure the course.</td>
</tr>
</tbody>
</table>
| 2. Design | The IDA reviews source materials and interviews SMEs to learn about the course content. Although the IDA does not need to become a content expert, a solid understanding of the source content helps the IDA to ask the correct SME questions and ensure that the course organization is logical and the content is complete.  

The IDA writes a detailed design document for the course.  

Client SMEs review the design to ensure that it covers all necessary content and the proposed course organization is effective. |
| --- | --- |
| 3. Production | During Production, the IDA writes the actual course text (slide text, instructor notes, audio scripts, etc.).  

SMEs review the course text to provide content and editorial changes.  

During this phase, the IDA builds the actual training materials, which will vary depending on product type. As part of this task, the IDA works with the graphics/media team to develop course graphics and audio files (if applicable).  

Depending on the complexity of the project, SMEs may review the training materials one or more times. | • **High-Level Course Outline** – Lists the very high-level topics that the training materials will cover.  

**Instructional Design Map** – Detailed outline for the course that identifies all topics and subtopics for the course, slide-by-slide. Also includes instructional design treatments, graphics ideas, and source content.  

• **Content Script** – Similar to the instructional design map, but includes the fully scripted course text, rather than a list of topics. ILT product types and certain WBT product types do not require content scripts.  

• **Course Materials** – Depending on the product type, the course materials may include:  
  - WBTs, built in various development tools and available for review online  
  - ILT PowerPoint presentations and activity guides  
  - Job aids and handouts |
| 4. **Acceptance** | All CDC team members review the final drafts of the course materials for quality. For WBT courses, this review includes thorough testing of the course functionality on the Test LMS.

The client reviews the materials to confirm that the course is functioning as expected and to identify any final changes. At this point, the client is not expected to request content changes or any non-essential editorial changes.

Some clients request that we complete a pilot review session as part of the Acceptance phase. During the pilot, a group of testers, representing the target audience, completes the course and provides feedback. | **Revised Course Materials** – Course materials that include all review updates. |
| --- | --- | --- |
| 5. **Deployment** | The IDA provides the final course materials to the client.

For WBTs, this phase includes providing the published course files to the client’s learning support team so that they can post the course to their internal LMS, where employees will begin taking the training.

For ILTs, this phase may include a formal handoff of materials to the course instructor, where the IDA reviews the deliverables with the instructor and answers any questions.

The IDA and IDL ensure that all final course files are archived on the CDC’s document repository. | **Final Course Materials** – Final versions of all deliverables that are ready for the client’s use. |

**Internship Projects Overview**

During the internship period, I worked on four main projects:

1. Accenture Human Resources Compensation Tool
2. Business Automobile Revisions
3. Medicare Reporting Training
4. Chart of Accounts Training

At any given time, I typically worked on two projects consecutively, each at approximately half-time or 20 hours per week. As time allowed, I also worked on other activities, such as helping colleagues with their training projects and attending training related to my role.

The timeline in Figure 2 indicates the approximate timeframe for each major project. As you can see, the Accenture Human Resources Compensation Tool project ran the duration of the internship period. The training development projects were staggered throughout, with one week of overlap between the Medicare Reporting and Chart of Accounts projects.

![Figure 2: Approximate Project Timeline](image)

In this section, I cover the individual projects in more detail, starting with the Accenture Human Resources Compensation Tool. I provide a summary of each project – including the type of work, purpose, audience, key tasks that I completed, and the project outcomes.

**Accenture Human Resources Compensation Tool**

Throughout the internship period, I worked as a temporary writing resource for the Business Support Services group. My role was to assist the functional architect in creating documentation related to a new application. I began work on this project prior to the start of the internship, and I remained staffed to the project throughout the internship period.
**Project Overview**

This project related to a new HR tool that Accenture was developing – the Accenture Human Resources Compensation Tool, an application for automating and managing employee compensation. While the development team was creating the tool, I worked with project SMEs and the functional architect to create a number of standard documents related to the new technology. These deliverables, including a variety of Microsoft Word documents and PowerPoint presentations, were all part of Business Support Services’ standard process for developing new applications.

**Major Project Tasks**

I began my work on the project by learning more about the Compensation Tool. I met with the functional architect and SMEs, who gave me context around the Business Support Services team’s work on the Compensation Tool and provided an overview of the tool and its capabilities. I also reviewed source materials on my own to learn about general compensation processes and the Compensation Tool functionality. After gaining background knowledge, I created or helped create deliverables for three phases of the overall Compensation Tool development effort – Analysis, Design, and Production.

**Analysis Phase Deliverables**

The Analysis phase is the time when the functional architect explores the business need driving a new technology. The business need is essentially what the technology needs to be able to “do” (including the processes it needs to support).

The most important deliverable that I created during the Analysis phase was the Compensation Tool User Scenarios document, a Word document outlining each of the numerous user scenarios for testing the system. The functional architect explained that the Compensation Tool User Scenarios document should include all common and critical tasks that end-users would need to perform in the new application.

I made an initial list of the tasks and sub-tasks based on the source content and then worked with a SME to identify high-priority and/or high-frequency activities. The list of scenarios quickly grew as the SME helped me to think through the variations on each task. For example, **Figure 3** illustrates how the task “Enter pay recommendations” became numerous scenarios based on all of the possible combinations of employee types:

- Full-time or part-time
Exempt or non-exempt (exempt workers do not receive overtime pay)

Within salary range, above salary range, or below salary range

Figure 3: Main Task and Variations

For each scenario variation, I scripted the basic steps, expected system results, and any special system requirements.

Design Phase Deliverables

Next, the project moved to the Design phase in which the functional architect began writing detailed system requirements. While I was not able to write the actual programming requirements, I worked on the following deliverables:

- **Training Plan**: A high-level plan for the training that Accenture would deliver with the Compensation Tool.
• **Training Design:** A PowerPoint presentation describing additional details around the training participants would need when their companies implemented the Compensation Tool, including specific topics and product types.

• **Configuration Design:** A PowerPoint presentation to introduce Accenture resources to basic configurations that they might need to implement when customizing the Compensation Tool for client use.

*Appendix B* provides more detail on how I created these materials and brief samples of each deliverable.

**Production Phase Deliverables**

During my last few weeks on the project, I worked on Production phase deliverables that most closely resembled my training development work. The Production phase is when the development team updates the system functionality and creates documentation to support the finished system.

First, I created the Introductory Training Presentation in PowerPoint. The presentation introduced the tool to employees at the client site that would be helping to implement the tool (e.g. help desk support and HR managers). As needed, Business Support Services would customize this generic presentation for specific companies.

Next, I drafted the Compensation Tool User Guide, a Word-based manual providing context and step-by-step instructions to help client end-users complete key tasks in the system. To develop the user guide, I completed the following tasks:

• Adapted some content from existing vendor documentation.

• Developed additional content by exploring the system to identify the steps for tasks not included in the vendor documentation.

• Created a template for the user guide based on Accenture branding guidelines and my knowledge of document design. To view a sample of the user guide template, see *Appendix C*.

My work on the Accenture Human Resources Compensation Tool project stopped at the end of the internship period after I completed the first draft of this user guide. The pipeline of training work within the CDC picked up again, and I transitioned back to a full-time instructional design role.
Project Outcomes

At the end of the internship period, the functional architect completed a formal performance evaluation of my work and provided positive feedback, including the following: “Dora has done an excellent job in reusing and improving existing deliverables to make the Compensation offering project more efficient and effective. She has taken the lead on training-related deliverables and has created a very complete set of User Scenarios that the development and UAT teams will find useful later in the project.” The Business Support Services team finished developing the Compensation Tool in December 2009 and made the tool available to external companies. In 2010, Accenture delivered the tool to a large communications and technology company in Australia. Accenture will continue to market the Compensation Tool and expand sales to other clients.

Business Automobile Revisions

A second major project that I worked on during the internship period focused on revisions to three external client web-based training courses originally developed by the CDC. The client for this project was an insurance company with which I had worked previously.

Project Overview

The original courses, developed approximately six months earlier, comprised a set of training on the client’s business automobile insurance. The current courses were delivered to an internal client audience of insurance underwriters and claim representatives, and the client wanted to repurpose the training for delivery to an external audience of independent insurance agents. Preparing the course for this audience required minor content and wording changes and new instructions around course completion, as agents use a different LMS than internal employees. Agents were also able to earn Continuing Education (CE) credit for taking this optional training; therefore, the project requirements included the development of assessments to accompany the training. These assessments ensured that the agents had mastered the course content before receiving credit.

Major Project Tasks

Although I had worked as an instructional designer for Accenture Learning for a few years prior to the internship, the Business Automobile Revisions project was a new experience for me. This project was my first opportunity to serve as the IDL for a training development
effort. The project gave me the opportunity to develop skills such as managing work plans and leading status calls with the client.

Typically, an IDL manages instructional designers that complete the development work; however, I served a dual role as IDL and IDA because the project was small. The dual role meant that I completed both the project administration tasks and the actual training development work.

**Project Administration**

During the Planning phase, I attended meetings with my project manager and the client lead to discuss the business need for the revised training and clearly define the scope of the revisions, final deliverables, and timeframe for completing the work.

Next, I created the project work plan in Microsoft Project. I identified the major development tasks for the project, the required review cycles, and reasonable time estimates for these activities. After drafting the work plan, I met with the IDM to discuss the estimates and make additional revisions. As this was only the second work plan that I had developed, it was very helpful to get my manager’s input. For example, he pointed out a deployment task where I needed to add additional time in case we were to encounter technical problems with the finished courses. **Figure 4** shows a portion of the project work plan with tasks that I marked complete as the project progressed. For the Marketing Review task, I added a note to explain that the client requested an additional review that changed the end date for the project.

![Figure 4: Portion of Project Work Plan](image)

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2 This particular client assigns a “client lead” to each project. The client lead is part of the client’s internal training team. The client lead oversees the training projects that Accenture Learning creates to ensure that the deliverables meet the client’s expectations and that Accenture Learning is honoring the contract with the client.
In addition to creating and maintaining the work plan, I also completed the following administrative tasks:

- Led weekly status calls with the client lead.
- Reported weekly status to my IDM, including tasks completed during the status period and those planned for the next period.
- Completed detailed quality assurance reviews of all deliverables before providing them to the client for review.
- Tracked project ratios for IDL, IDA, graphics, and media work to keep the project at or under budget.

**Training Development**

As the instructional designer for the project, my first task was to confirm the project requirements and the changes the client was requesting. I met with the client lead to discuss the project requirements and find out more about the agent audience’s learning needs. To minimize the risk of rework later in the project, I created mockups of some of the larger changes and met with the client lead to talk her through my ideas. For example, the client disliked the visual design of the course menu slide (Figure 5), but could not articulate the changes that she wanted, other than requesting that the new menu be “sleeker.” I provided a few options for revising the menu, and the client selected her preferred option (Figure 6).
Module 1
The Business Auto Coverage Form

Course Menu
This module includes four topics about the Business Auto Coverage Form, CA0001 and the course conclusion. To view a specific topic, click the topic below.

1. Business Auto Coverage Form Overview
2. Liability Coverages
3. Physical Damage
4. Business Auto Conditions

You can return to the menu from any slide in the course by clicking the Menu icon in the lower right corner of the screen.

Glossary Menu

Business Automobile and the Extended Coverage Endorsement - Business Automobile Plus

Course Menu
To view a specific topic, click the topic below.

- Business Auto Coverage Form Overview
- Liability Coverages
- Physical Damage
- Business Auto Conditions
- Extended Coverage Endorsement – BA Plus
- Conclusion

Click the Menu link to return to this screen.

Menu Glossary

Figure 5: Original Menu Slide

Figure 6: New Menu Slide
After confirming the changes, I updated the courses in PowerPoint. These updates included the following tasks:

- Revised course text as needed to ensure all content applied to the new audience.
- Updated course navigation and completion instructions to match the functionality of the Agent LMS.
- Requested graphics revisions from the graphic artist and inserted the new graphics when available.
- Worked with the media team to record audio for slides where the audio text was to be changed.

As I was revising existing courses, rather than creating new training, I did not need to learn the detailed content or gather additional sources; however, I did need a basic understanding of the existing course content in order to write the CE assessments. I read through the courses and asked the client lead questions to clarify information. Next, I drafted the assessment questions, ensuring that they covered content related to each of the course learning objectives. I published the assessments in an application called Questionmark™ to make them available for agents to complete online after taking the training. Appendix D displays one of the course assessments that I exported to Word for SME reviews.

After completing the revisions and necessary client reviews, I published the courses using Adobe® Presenter and posted them to the CDC’s Test LMS for internal acceptance testing to confirm that the courses were functioning correctly before deploying them to the client.

**Project Outcomes**

The project was well received by the client lead, who completed a customer satisfaction survey and gave our development team an average score of 4.7 out of 5 on all survey questions.

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3 Questionmark™ is a program for developing interactive course questions and assessment tests for online delivery. The published questions are in a format suitable for posting to an LMS, where companies can track completion and scores.

4 Adobe® Presenter is a PowerPoint add-in program that allows developers to create web-based courses in PowerPoint. The tool provides functionality for adding audio and publishing course files into a course package that developers can load to an LMS as online training. Adobe® Presenter is very similar to Articulate® Presenter.

5 The CDC asks client leads and/or Business Interlock team members to complete customer satisfaction surveys to provide feedback on their experience working with Accenture Learning. These surveys are optional and ask the
I also received positive feedback from my project manager, stating that he was impressed with my ability to take on the IDL role for this project: “Dorie has increased her ID Lead skills on this project. While she is not managing any other IDAs on the project, she is independently producing her own estimates, work plans, and status reports, as well as handling all client communications. Dorie has performed in this role very well, requiring little assistance from her manager.” The client made the training available to agents shortly after the project ended, and the courses are still active as of November 2010.

**Medicare Reporting Training**

Medicare Reporting was a new training project that materialized during the internship period. This project was for the same client as the Business Automobile Revisions project, but I worked with a different client lead.

**Project Overview**

The Medicare program published new guidelines for how insurance companies must handle claims on behalf of Medicare beneficiaries. As a result, the client needed to train its claim representatives to collect all of the necessary information to meet these new requirements. The client asked the CDC to create an ILT course in PowerPoint and a demonstration guide in Word with step-by-step instructions for completing key activities in the claim reporting system.

**Major Tasks**

I worked with another CDC resource to develop training for the client around new Medicare reporting procedures. We shared the IDL and IDA responsibilities for the project.

**Project Administration**

My IDL duties for this project were very similar to the tasks I completed for the Business Automobile Revisions project; however, the amount of time I spent on these tasks for Medicare Reporting was smaller, as I shared the tasks with another resource.

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survey participants to rank their satisfaction in eight specific areas. Participants assign a satisfaction score of 1 through 5 (5 being the highest satisfaction ranking) to each area, and we average the scores to calculate the overall satisfaction level. We aim for an average score of 4 or above on all projects.
Training Development

The Medicare Reporting project closely followed the standard CDC training development process; however, due to strict time constraints on development, we did not create all of the standard deliverables.

In the Design phase, we did not have time to complete the instructional design map. Instead, we worked with the client to develop a simple outline for the course. The outline included all of the major topics we planned to cover and showed the basic organization we proposed for the course; however, it did not include slide-by-slide detail, graphics ideas, or source content. To ensure that the course included the correct topics and the organization made sense, we needed to learn more about the Medicare reporting guidelines. We reviewed source materials that the client provided, including current training around the basic claim handling process. We also compiled questions and sent these to the SMEs via email. As we learned more about the content, we revised the initial draft to create a solid outline for the course.

During the Production phase, we created the content script for the course, including the complete slide text and instructor notes. To save time, the other resource and I divided the course in half and drafted the complete text for each of our assigned slides. We then swapped sections of the course to review each other’s work and identify any inconsistencies. Finally, I reviewed the entire document to make sure that the writing style was similar throughout and the course read as if it had one author.

After the client lead and SMEs reviewed and approved the content script, we moved to the next Production task – building the course materials. In this case, we used the wording from the content script to build each course slide in PowerPoint and created the separate demonstration guide in Word. We divided the work so that I focused on the demonstration guide. I accessed the Medicare reporting system and documented the exact steps. Figure 7 shows a portion of one activity section. I began the section by identifying the specific task that the instructor would cover (in this case, completing exhaust date information) and highlighting the key messages that the instructor should convey to the learners. Then I listed the steps that the instructor should cover in the system. Appendix E provides a longer sample.

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6 In general, the CDC does not create content scripts for ILT product types; however, this particular client requested content scripts for both ILT and WBT courses.
To finish the project, we completed a careful quality review of the deliverables and sent the courses to the client lead for a final review (thus completing the Acceptance phase). In the final phase, Deployment, we provided the course deliverables to the client lead, who then coordinated the logistics for the actual training session at the client location. I completed our work on the project by archiving the course files.

**Project Outcomes**

The client lead was impressed with the deliverables and provided the following feedback: “These [materials] look great! Very well structured, good balance for visual movement and the script is pointed and direct. I am very pleased with the product.” He gave us an average score of 5 out of 5 on the customer satisfaction survey. After we deployed the course, the client began conducting the training sessions at the end of June 2009 and finished training all claim representatives in November 2009.
Chart of Accounts Training

Chart of Accounts was the final project that I started during the internship period. This project was for a new external client for whom I had not worked previously. This client was an international equipment manufacturer with truck, plant, and military business units.

Project Overview

The client was consolidating and streamlining its processes for managing financial information. A major part of this effort was the development of a standard set of financial accounts (called the “Chart of Accounts”) and a centralized governing body to oversee changes to financial accounting information for all of the company’s business units. The client needed to develop training around the changes associated with the new process.

The client requested two courses. The first course was an eBriefing for a large, general audience. An eBriefing is a web-based course that is shorter and includes fewer graphics than a regular WBT. The second course was an ILT for a small subset of learners. I developed these courses in tandem; the content for both was closely related, and I worked with just one set of SMEs.

In this section, I describe the high-level tasks I completed for both courses. I will describe the process I followed for the eBriefing course in detail in Chapter 3.

Major Tasks

On this project, I was the IDA and had an IDL overseeing my work; however, the IDL was also working for other clients, so I sometimes submitted drafts without the lead’s review and often attended client meetings alone.

In the Planning phase, I reviewed project documentation, standards, and product types to get up to speed on the requirements. I drafted initial SME questions to learn more about the content and reviewed the source materials that the client provided. With this content knowledge, I revised the high-level course outlines in the Preliminary Learning Brief (PLB) to create first drafts of the instructional design maps for the courses as part of the Design phase.

Then I attended a SME kick-off meeting at the client location. I used my list of SME questions and drafts of the instructional design maps to gather additional information about the process changes.

Next, I revised the instructional design maps. I met frequently with the client SMEs and sent questions via email to gather more information. After receiving client feedback and approval
for the instructional design maps, I finalized the documents to complete the Design phase, and the client placed the project on hold.

This project resumed prior to the end of my internship period. At this time, I reconfirmed the instructional design maps with the client SMEs and moved to the Production phase. For the ILT course, I built a PowerPoint presentation and a dual instructor guide/participant guide to accompany the course. This guide included supplemental information for completing the hands-on practice activities included in the training. It also had instructor notes for teaching the course that would be hidden in the participants’ view of the document. To view samples of the ILT deliverables, see Appendix F.

For the eBriefing course, I built the course slides in PowerPoint and used functionality from an instructional design tool called Articulate® Presenter7 to add audio, create timed animations, and publish the slides for use as an online training course.

In the Acceptance phase, I provided the course materials for the client lead to conduct pilot reviews with members of the target audience. The client set up a mock classroom session for the ILT course and posted the eBriefing course to the LMS for pilot testing. We collected a combination of oral and written feedback from approximately 25 pilot participants. The pilot tests helped me to confirm that I was covering the correct content at a level that our target audience could understand. While I did not receive a large volume of feedback, the pilot helped me to identify areas where I needed to clarify my wording and provide better examples to illustrate the new Chart of Accounts guidelines.

After the pilots, I finalized the deliverables and deployed the courses.

Project Outcomes
The Chart of Accounts courses were a success. The BI team gave us an average score of 4.9 out of 5 on the customer satisfaction survey, and we built a strong relationship with the client, who contracted the CDC to create a number of additional Finance Transformation courses in 2009 and 2010. I received the following personal feedback from the BI lead: “Dorie has gone out of her way to demonstrate high performance delivered on the CoA Governance courses. Not only has she done great work, but she has gained significant credibility with the client by being

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7 Articulate® Presenter is a PowerPoint add-in program that allows developers to create web-based courses in PowerPoint. The tool provides functionality for adding audio and publishing course files into a course package that developers can load to an LMS as online training. Articulate® Presenter is very similar to Adobe® Presenter.
onsite and working directly with SMEs and client stakeholders.” Finance employees began taking the training in September 2009, completing the training before the client fully implemented the new Chart of Accounts in February 2010.

In the next chapter of this report, I describe the Chart of Accounts eBriefing development in more detail, including the later parts of the project that I completed shortly after the internship period.
CHAPTER 3: DEVELOPING THE CHART OF ACCOUNTS eBRIEFING COURSE

As I mentioned previously, the projects that I completed during my internship were not always consistent with my job responsibilities as an IDA nor did they follow the complete training development process. In order to give a more comprehensive overview of the activities I typically complete when developing a new training product, I describe one course in particular, the Chart of Accounts Governance Fundamentals eBriefing.

In total, I worked on this course for approximately 11 weeks. Although I did not complete the entire project during the internship period, I feel that this is an important assignment to describe in detail as it most closely followed the complete content development process. My description of this project illustrates the wide range of tasks involved in creating a typical training course.

Project Background

The Chart of Accounts project resulted from a large change to the client’s processes for managing financial data. Most of the training that I have worked on has been part of a change management effort like this one, when a company implements a new process or technology and needs to train its employees so that the changes take effect without disrupting business.

One problem with the client’s old financial management processes was that the various groups within the company used different terminology and data values when reporting their financial information in invoices. These differences made it difficult for the corporate Accounting and Finance department to compare data from different groups and report on the complete financial picture of the company. In order to improve their ability to report financial data and protect the client in the case of an audit, Accounting and Finance needed to revise their processes for collecting data across the company.

At this point, the client hired an Accenture consulting team to help them determine the changes they should make to their business processes and to recommend and implement new technologies to facilitate the new processes. The consulting team worked with the client to develop a common financial language for use throughout the company. This language, called the Enterprise Chart of Accounts, specified a set of values that all groups within the company would use so that invoices and reports would be easy to compare. Within the Accenture team, the Business Interlock (BI) team was responsible for coordinating all training to accompany the new
In this section, I describe the work I completed in each phase of the content development process, including the Planning and Design phases, which I completed during the internship period, and the Production, Acceptance, and Deployment phases that I completed shortly afterward.

**Planning Phase**

At the start of the Planning phase, my IDM and IDL met with the BI team several times to discuss the scope and requirements for the course. They discussed details regarding the size of the audience and timeframe for developing the training. Based on the client’s needs, the IDM recommended the eBriefing product type as the appropriate training deliverable. Then the BI team created a contract called the Preliminary Learning Brief or PLB. The PLB described the deliverables we would produce and all assumptions around the availability of SMEs and source materials. After the BI team obtained the appropriate client signatures on the PLB, training development began.

As the IDA on the project, I did not attend the early planning meetings; instead, I met later with the IDM and IDL, who explained the project background and provided the PLB. My IDM also gave me a draft of the project work plan. The IDM explained that the course would be a 30-minute eBriefing with a five-question assessment to check the learners’ understanding of the content.

**Reviewing Project Documentation**

During the Planning phase, my main task was to learn about the project by reviewing the PLB. Table 2 summarizes the sections that provided the most helpful information.
Table 2: Key Sections of the Preliminary Learning Brief

<table>
<thead>
<tr>
<th>PLB Section</th>
<th>Description</th>
<th>What I Learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Summary</td>
<td>A brief explanation of the purpose of the course.</td>
<td>I learned that the course would be a general overview of the new process to request changes to and maintain the Chart of Accounts. The summary also explained that this course was a prerequisite for a separate ILT for one group within the audience. From this information, I inferred that this course would be fairly high-level and should not include details specific to the ILT audience.</td>
</tr>
<tr>
<td>Stakeholders</td>
<td>A list of the SMEs and other reviewers for the course.</td>
<td>The list included three content SMEs, three additional reviewers, and four final sign-off approvers. The variety of stakeholders told me that the course would need to meet the expectations of a wide group of reviewers and that I might expect a large volume of feedback throughout the development cycle.</td>
</tr>
<tr>
<td>Target Audience</td>
<td>A short description of the target audience, including size and location.</td>
<td>The description of the target audience was as follows: “Employees that request, approve or administer changes to the Chart of Accounts.” The PLB stated that the audience would be approximately 50 employees throughout the United States, Canada, and Mexico. This description told me that the course audience included a broad range of roles and geographic locations.</td>
</tr>
<tr>
<td>Learning Objectives</td>
<td>A list of the key takeaways from the training.</td>
<td>The learning objectives are the foundation for any training project. The objectives list the tasks the learners should be able to complete or the information they should understand upon completion of the course. The PLB listed four objectives for the training. All of the objectives were related to knowledge recall. For example, one objective was “Explain why changes are being made to the Chart of Accounts and the benefits associated with these changes.” These objectives implied that the course was not intended to teach any specific system procedures, but rather to impart knowledge of the process changes.</td>
</tr>
</tbody>
</table>
Formulating Initial Questions

While the PLB was helpful, it did not provide the full context I needed to begin creating the training. I was left with a lot of unanswered questions, including the following (organized by PLB section):

- **Stakeholders:**
  - Are certain SMEs on-point for questions on specific content areas?
  - Which stakeholders should I involve in each review cycle?
  - How should I work with these SMEs? Is it best to email questions or set up phone calls?

- **Target Audience:**
  - What roles does the audience include?
  - Do job responsibilities related to the Chart of Accounts vary by role?
  - Is language translation from English to Spanish a requirement for the Mexican audience?

- **Learning Objectives:**
  - Are there any tasks for users to complete after taking the training?
  - Is this list complete given the topics listed in the high-level outline?

- **High-Level Outline:**
  - What do the acronyms mean?
  - What is the estimated duration of each content topic?
  - Does the “Available reference materials” topic warrant its own content section, or can we combine it with our Course Conclusion module?
Reviewing Product Description and Samples

Another task I completed during the Planning phase was reviewing the standard product description and sample courses, to ensure that I understood the deliverables that I was creating. This project was my first eBriefing course, so reviewing the product type description was very helpful in setting my expectations for the deliverables. From the eBriefing product description, I learned that:

- eBriefing courses are PowerPoint presentations that we convert into online training courses using Articulate Presenter.
- A 15-minute eBriefing course is usually 15 slides. So, for my 30-minute course, I should assume the course would have 30 slides of content.
- eBriefings include audio narration that we record directly in Articulate or import from another source. Typically, the IDA records the audio, unless the client pays an additional fee for professional audio.
- eBriefings include static images and simple text animations that the developer sets up in PowerPoint. The graphics team can create complex graphics or Flash animations at an additional cost.

I also looked at the eBriefing samples available in the repository. Although the CDC developed these for other clients, the samples gave me a good idea of how my finished product should look and function. For example, I saw that when published, text within eBriefings appears slightly blurred, particularly when there is a lot of text on the slide and the font size is small. For my course, I knew that I would need to keep slide text to a minimum in order to ensure maximum readability for the learners.

Reviewing Client-Specific Templates and Standards

The final activity I completed in the Planning stage was to familiarize myself with the client’s templates and standards. Most clients have a set of training templates that match their corporate branding and ensure consistency throughout their training programs. Sometimes the CDC creates these templates, but for this particular client, the BI team provided templates that all training vendors would use for this client. The PowerPoint template for the eBriefing development was very simple and provided the color palette and fonts for the course. The template did not include any standard graphics other than the client’s logo. When selecting
images for the course, I knew that I would need to pick images that would complement the color palette.

I also reviewed the client’s editorial standards. The BI team provided a brief style guide that specified information such as file naming conventions and standards for abbreviations, acronyms, capitalization, gender neutrality, italics, numbers, and punctuation. I revisited this document at various times during the development process to ensure that I was following the client’s specifications.

After reviewing the PLB, product definition, templates, and standards, I advanced to the Design phase and began developing the first key deliverable, the instructional design map.

**Design Phase**

To describe the activities I completed in the Design phase, I divide this explanation into three parts:

1. Initial Draft of Instructional Design Map
2. SME Kick-Off Meeting
3. Revision and Review Cycle

**Initial Draft of Instructional Design Map**

The PLB outlines were very high-level, and a client SME drafted them several months prior to the start of our project, so I started by learning more about the source content in order to better understand the topics that I should include and how best to organize those topics. I reviewed the source materials that the client provided and revised the original outline to include only the appropriate content and improve the organization. The highlighted section of Figure 8 shows the Process Overview topics as they appeared in the outline. Figure 9 shows a portion of the same section within the instructional design map. As you can see, the map identifies additional content details and the proposed instructional designs.
The instructional design map (Figure 9) provides a slide-by-slide look at the course, organizing information in the following columns:

- **Module/Duration**: Each course includes main topics or modules to organize the information. In this column, I identified the modules and estimated durations.

- **Learning Objectives**: In this column, I listed the learning objectives that the module content addressed, checking to see if there were any objectives from the PLB that the content did not cover.

- **Content Components – “What” to Learn**: In this column, I listed the specific content topics that I planned to cover on each slide of the course. To fill in this section, I started with the high-level outline from the PLB. Then I reviewed source content materials to find out what the logical sub-topics would be.

- **Instructional Approach – “How” to Learn**: This column captures the instructional design approach for the slide content. In some cases, the treatment was simply slide text. For other content, it was appropriate to include graphics, links, or other treatments. In all cases, I had to make sure that the treatments were appropriate for the eBriefing product type.

- **Handouts/Activity Inputs**: In this column, I identified any supporting materials for the slides. Handouts and activity materials are most common for instructor-led training courses, so I did not identify many items for this course.

- **Notes/Source Documentation**: This column shows the source content available for each slide. I completed this section by reviewing all of the materials that the client provided. For some slides, I did not find any content that covered the topics and documented these content gaps.

While working on the initial draft of the instructional design map, I learned more about the Finance Transformation project and the Chart of Accounts. With this knowledge, I began to see places where it made sense to separate, combine, and reorganize information to improve the overall flow of the course. In some places, the organization in the original PLB outline no longer made sense.

**SME Kick-Off Meeting**

After I finished drafting the instructional design map, I attended a SME kick-off meeting at the client site along with my IDM and IDL. The overall objectives of this meeting were to
establish a rapport between the CDC team and the SMEs, ensure that everyone understood what we were developing, and confirm that the instructional design map covered all of the content needed in the course. The IDL started the meeting by facilitating SME introductions, explaining our development process, and describing the eBriefing product type. Next, I led the SMEs through the instructional design map. After distributing hard copies of the document, I explained the high-level overview of the course (forecasting the main content modules). Then I covered the slide-by-slide details, focusing on the content topics and sub-topics. The SMEs provided input on topics to add, delete, or expand upon. They confirmed the organization and clarified which topics deserved the most attention. They also directed me to additional source content. After we reviewed the instructional design map, I asked content questions and confirmed that the source content I already had was up-to-date.

**Revision and Review Cycle**

After the kick-off meeting, I revised the instructional design map based on the SME comments and gathered additional content. I used a simple question log document (Figure 10) to batch content questions and send them via email each day. The log organized questions by topic and included space for the SMEs to provide their answers.
I revised topics and text as needed and updated the instructional design treatments to reflect the content changes. For example, the map included a slide about a Chart of Accounts sub-process where I had planned to create a detailed process flow. The SMEs explained that the audience for this course did not need detailed information about the process, so the process flow treatment was no longer appropriate. After updating the instructional design map, I emailed the document to the SMEs for review.

The SMEs reviewed the instructional design map to provide final feedback. One SME sent detailed comments, another simply said that the document “looked good,” and the third SME did not respond at all. This type of response (or non-response) is typical for training development projects, as the SMEs are often busy with other responsibilities. I followed up with the non-responder again to solicit a response, and then got the BI team’s approval to continue without his feedback. As developers, we do not have much control over SME responsiveness.
Often, SMEs provide very little input early in the project, and later request large-scale changes to the topics and organization that are more costly to implement late in the development process. When this happens, the CDC documents the feedback, assesses the additional effort to make the changes, and charges the client accordingly.

After revising the instructional design map based on the SME review, I sent a final version to the SMEs for reference. At this point, the Design phase was complete, and I moved to the Production phase.

**Production Phase**

The Production phase was the most time-consuming stage of the project and included the initial build of the course in PowerPoint, a SME review, and final build updates.

**Initial Build**

During the initial build, I wrote the course text directly in PowerPoint. Using the instructional design map topics and the source content, I first wrote the complete audio script for each slide. I typed this text directly in the notes section of the PowerPoint presentation. Next, I picked out important information from the script and entered this text on the course slides. I ensured that the slide text was concise and reinforced the key points from the narration. For some slides, I needed to break one slide into two in order to cover all of the necessary information without overcrowding the slides.

When building the course, I applied the instructional design treatments that I had identified in the instructional design map. For some slides, this meant that I created tables or simple graphics in PowerPoint. For other slides, I selected stock photo images from the CDC’s approved graphics source. I searched for and selected appropriate images to add visual interest to the course. Then I sent a request for a graphic artist to purchase and properly format the images. The graphic artist sent me the finished images within one week of my request, and I inserted them into the course.
Figure 11 shows an example of a slide in PowerPoint. You can see the slide with key points and graphics. The notes section below the slide displays the audio narration.
To create the five-question course assessment, I identified the questions that I wanted to ask based on the key points and learning objectives for the course. Next, I built the questions in a program called Articulate® Quizmaker⁸, specifying the question text, answer options, and answer feedback. Figure 12 shows an example of how a question displays in Quizmaker.

![Figure 12: Assessment Question in Quizmaker](image)

In Quizmaker, I selected various settings to specify how the assessment should function in the online course. These settings are very important, especially for a course like this one where the learners will not receive credit for completing the course unless they pass the assessment. I established settings for the following parameters, based on the client’s specifications:

- How many times the learner could retake the assessment (Learner had unlimited attempts.)
- Whether or not the learner could leave the assessment to review course content (Learner could not review course content while taking the assessment.)

---

⁸ Quizmaker is a program for developing interactive course questions and assessment tests for delivery as part of an Articulate course and is part of the standard Articulate Presenter package. Quizmaker functionality integrates with the learning management system so that question scores count towards course completion requirements.
• Whether the learner received feedback after each question or cumulative feedback at the end of the assessment (Learner received cumulative feedback.)
• How many points each question was worth (Each question was worth 1 point.)
• How many points or what percentage score the learner needed to pass the assessment (Learner had to score 80% or 4 out of 5 points to pass the assessment.)

After writing the audio script, building the slides, and creating the assessment, my final task was to publish the course for online viewing using Articulate. The output from this tool was a published course .zip file for me to post on our Test LMS for SME review.

Figure 13 shows a sample slide from the published course on the Test LMS. If you compare this image with Figure 11, you can see how the published course compares to the original PowerPoint presentation. The published course displays in a course player with navigation controls that allow learners to move forward and backward in the course. The audio transcript for the course displays on the Notes tab to the left of the slide.

![Published Course Slide in Articulate](image-url)
SME Review

The next step in the Build phase was for the SMEs to review the published course on the Test LMS. The goal of this review was to get the SMEs to sign off on the slide text and audio narration before I recorded the audio. To facilitate the review, I sent the SMEs a link to the course and instructions for logging into the Test LMS and launching the course. I collected the SME feedback and updated the course based on their input. The SME feedback was minimal, which I expected at this stage of the process, as the SMEs had already reviewed and approved the instructional design map.

Audio Recording and Integration

After finalizing the course script, I recorded the audio narration. To prepare for the recording, I read through the script several times and confirmed the correct pronunciations for unfamiliar words and acronyms. I also familiarized myself with the audio recording functionality in Articulate. For other courses, I had integrated completed audio files into Articulate, but I had never recorded audio directly in the tool. To minimize background noise during the recording, I reserved the CDC media team’s sound booth.

The audio recording was more time-consuming than I had anticipated. Recording thirty minutes of error-free audio took nearly four hours. At first, I struggled to achieve the correct volume and tone of voice. To my ears, my voice sounded loud and enthusiastic, but when I played back the first few audio files, my volume and energy level seemed low. I quickly learned that in order to come across as energetic in the recording, I needed to speak with what seemed like an exaggerated amount of energy. The recording also took a lot of time because I sometimes made a mistake and needed to re-record the entire slide. I had some experience with editing audio, but not enough to correct single words within a paragraph. When possible, I re-recorded only single sentences.

After I completed the recording, I edited the audio as needed in Articulate. I adjusted the volume, edited out false starts, and added pauses to improve the flow. I also synched the slide animations with the audio, so that the related slide text appeared in conjunction with the audio. I published and posted the course with audio for the next SME review.

Final Pre-Pilot Review

I facilitated a live walkthrough of the completed course at the client site to collect final SME feedback prior to the course pilot. For this review, I used a projector to share the course
with the SMEs and documented their comments in a feedback log (a simple Word document), as
we viewed the course slide-by-slide. After revising the course again, I published the course and
provided the files to the BI team, who posted the training to the client’s LMS for pilot testing.

Acceptance Phase

The Acceptance phase included two key reviews – the client’s pilot test and the internal
(CDC) acceptance test.

Pilot Test

First, the BI team facilitated a pilot review of the course. They identified a group of
reviewers that included content experts, business experts, and members of the target audience for
the course. The reviewers completed the course individually and sent their feedback to the BI
team, who compiled the changes into one feedback log. The feedback form, shown in Appendix
G, made it easy for me to consolidate the feedback and track my completion of each update. As
needed, I followed up with specific reviewers to clarify their suggested changes and contacted
the SMEs for their input and additional content.

Internal Acceptance Testing

After I updated the course with pilot changes, I republished the course for an internal
acceptance test. The IDM, IDL, and I reviewed the course thoroughly to ensure that it met the
client-specific standards and the CDC’s general quality standards. To complete this review, I
checked items such as:

- Formatting
- Spelling/grammar
- Writing style, clarity, and conciseness
- Functionality of links, animations, and checkpoint questions
- Scoring and bookmarking functionality on the LMS (to ensure that the published course
  communicated correctly with the LMS technology)

Deployment Phase

To deploy the course, I provided all of the online course files for the BI team. These
materials included the final published course for hosting on the client’s LMS, and the source
PowerPoint file, Quizmaker files, and graphics files. I also uploaded the final files to the CDC’s document repository, ensuring that the final files were clearly labeled, in case we might need to update the course in the future. **Appendix H** provides a sample of the final published course.

The course was well-received by the client. Employees began taking the training in September 2009 in preparation for the February 2010 rollout of the Chart of Accounts. We received high customer satisfaction scores from the BI team and continued working with the client on additional Finance Transformation courses in 2009 and 2010.
CHAPTER 4: REFLECTIONS ON INSTRUCTIONAL DESIGN AND TECHNICAL COMMUNICATION

When completing instructional design work for my internship, I applied theory and guidelines from the instructional design and technical communication fields. In this chapter, I describe Gagné’s Nine Events of Instruction and how I applied this popular instructional design model to my training courses. Next, I analyze the parallels between technical communication and instructional design, including the high-level processes for developing materials and the skills required to ensure that deliverables meet their objectives and demonstrate high-quality communication principles. Through this analysis, I reflect on the overall internship experience and how the Master of Technical and Scientific Communication (MTSC) program prepared me for a career in training development.

Gagné’s Nine Events of Instruction

One of the primary models for instructional design at the CDC is Robert Gagné’s Nine Events of Instruction. This theory is based on Gagné’s research into the mental events that occur when adult learners encounter mental stimuli. Gagné started developing his theory while analyzing military training for the U.S. Air Force. He found that the same stimuli impacting military pilots applied to civilian training in a variety of fields. In 1965, he published his research, presenting nine “events” that must take place for learning to occur.9

Application at Accenture Learning

When I started my job at Accenture Learning, this model was a key part of the new employee training. Table 3 identifies each learning event. To explain how the events directly apply to training development, the table also includes a summary of the CDC’s suggested applications (Accenture Learning, 2009).

---

Table 3: Gagné’s Nine Events of Instruction and CDC Application

<table>
<thead>
<tr>
<th>Event</th>
<th>CDC’s Suggested Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Gain attention</td>
<td>Start the course with an attention-grabbing introduction.</td>
</tr>
<tr>
<td>2. Inform learners of objectives</td>
<td>Set the learners’ expectations of what is about to be covered, including: key points, requirements, evaluation criteria, and materials.</td>
</tr>
<tr>
<td>3. Stimulate recall of prior learning</td>
<td>Remind the learners of previous knowledge related to the new material, supporting the big picture and helping to make connections.</td>
</tr>
<tr>
<td>4. Present the content</td>
<td>Explain the content to the learners in an organized and chunked manner, varying the means (text, graphics, animation, etc).</td>
</tr>
<tr>
<td>5. Provide learning guidance</td>
<td>Help the learners store the information in ways that it can be retrieved, using examples, experts and interactions.</td>
</tr>
<tr>
<td>6. Elicit performance</td>
<td>Ask the learners to practice what they have learned and to demonstrate understanding of the content.</td>
</tr>
<tr>
<td>7. Provide feedback</td>
<td>Advise the learners on correct and incorrect understanding of the content.</td>
</tr>
<tr>
<td>8. Assess performance</td>
<td>Determine if the learners can consistently perform the intended objectives (sometimes results in a certification once a specified score is achieved).</td>
</tr>
<tr>
<td>9. Enhance retention and transfer to the job</td>
<td>Provide the learners with strategies and practice of the newly learned skills to ensure they are retained and can be used in many appropriate situations and applications.</td>
</tr>
</tbody>
</table>

Over the past several years, the CDC expanded its application of Gagné’s theory, creating an instructional design “playbook” that provides specific examples of instructional design treatments and techniques that IDAs can apply to address each learning event. Essentially, this document is a catalog of instructional design ideas to enhance training courses. As part of the Design phase of the development process, instructional designers can review the playbook to identify new treatments to apply to their courses. For example, for Event 1: Gain attention, the playbook offers examples for pre-course assignments, introductory animations, course metaphors and themes, and icebreaker activities. The playbook is continuously evolving as developers submit new training designs that are then added to the catalog.
Application during My Internship

At the beginning of each training development project, I quickly reviewed the playbook to refresh my memory about Gagné’s theory and look for instructional design treatments that might apply to my courses. I considered whether or not the treatments were appropriate given the course content and product type. For example, one of the suggested treatments for Event 1: Gain attention was to work with the media team to create a short commercial video to capture interest; however, this type of treatment was not appropriate given my project types. Options like short Flash animations and executive welcomes were a better fit and allowed me to capture learners’ attention while staying within budget.

While developing a variety of deliverables during the internship period, I applied many of the events of instruction to my training projects. I also looked for opportunities to apply these guidelines to the Accenture Human Resources Compensation Tool project. In the sections that follow, I include examples to illustrate how I applied each event to a specific project. To view a summary of how I applied Gagné’s events to each internship project, see Appendix I.
**Event 1: Gain Attention**

I applied Event 1 to all of my internship projects, using some simple techniques for capturing learner attention with a limited project budget. For example, in the Chart of Accounts eBriefing course, I included an executive welcome to gain attention and provide valuable information about the important role that the learners would play in their company’s success. I included a picture of the executive and scripted text for the welcome message. The slide included audio of the executive reading the welcome message. **Figure 14** shows the executive welcome slide.

![Welcome from Chart of Accounts Owner](image)

**Figure 14: Event 1 Example from Chart of Accounts eBriefing**
Event 2: Inform Learners of Objectives

Clear learning objectives are one of the most important components of a training project; they are the foundation upon which the IDA develops content and builds the training deliverables. I applied this event to each project during the internship period. For the training courses, I included slides that described the overall purpose of the course and clearly listed the learning objectives for the training. I also created agenda slides to forecast the course content topics. For the Accenture Human Resources Compensation Tool project, I included purpose statements to clarify the overall objective of each technical document. Figure 15 shows the purpose statement and objectives for the Compensation Tool User Guide. As you can see, the objectives are parallel (each starting with a verb) and describe the key actions that learners should be able to complete.

About this User Guide

This user guide is meant to introduce client managers of all levels to key screens and features of the Accenture Compensation application.

For all managers, the guide includes instructions for the basic tasks you will perform to enter pay recommendations for your team.

For higher-level managers, the guide includes instructions for approving or modifying recommendations.

For those who need to run reports on compensation data, this document also provides an overview of the various reports and instruction on how to generate the data.

This user guide will help you to:

- Explain how the Accenture Compensation tool supports compensation recommendations
- Review your compensation-related tasks
- Access compensation details for members of your team
- Enter pay recommendations for individuals and groups
- Review and approve pay recommendations
- Run reports on compensation data

Figure 15: Event 2 Example from Compensation Tool User Guide
**Event 3: Stimulate Recall of Prior Learning**

Most training courses assume some type of prior knowledge from learners – this might be general knowledge (e.g. a basic understanding of internet search engines) or specialized knowledge related to a certain job role (e.g. familiarity with accounting and finance terminology and processes). Course content builds upon this knowledge base to help the learners develop new skills; however, not all courses emphasize prior learning with content reviews or pre-tests.

Overall, my courses focused on new content without much review of the learners’ prior knowledge, but I still applied Event 3 to an extent. For example, in the Medicare Reporting project, I presented content in terms of the current process versus the new process to help learners understand how the new steps fit into their current procedure. In **Figure 16**, I provide an example from the Medicare Reporting ILT course. On this slide, I ask learners to recall their prior knowledge of the Medicare Set Asides process and compare the existing process with the new Medicare reporting guidelines to help them understand what is changing.

![Figure 16: Event 3 Example from Medicare Reporting ILT](image)
**Event 4: Present the Content**

Event 4 is one of the most straightforward events of instruction, but given the wide variety of possible design techniques, it can also be the most challenging to apply. Often, the correct approach to presenting the content is to provide clear and complete information as simple text on a page or slide. This method conveys without distractions the information that the learners need to know. However, the plain text approach makes it harder to hold the learners’ attention, so I combined this simple treatment with more dynamic instructional designs for variety and increased learner engagement. **Figure 17** shows a sample slide from the Chart of Accounts eBriefing, where I applied Event 4 in several ways:

- Presented content on roles and responsibilities as an organization chart to help learners visualize the hierarchy.
- Highlighted roles within the chart as the audio narration described each in detail.
- Included links to additional information on the client’s intranet site.

![Figure 17: Event 4 Example from Chart of Accounts eBriefing](image-url)
Event 5: Provide Learning Guidance

Event 5 overlaps with Event 4, as both events focus on conveying the course content to the learner. Event 5 helps learners to store the content in their long-term memories so that they can recall the essential information at a later time. One common method at the CDC is to provide realistic scenarios so that learners think about the content in terms of their day-to-day activities. Tips and factoids are another strategy for helping learners to retain information. ILT courses have an advantage where Event 5 is concerned, as they give learners real-time access to a content expert (i.e. the instructor), who can answer questions and provide guidance throughout the training. For example, in the Chart of Accounts ILT course, I designed short instructor demonstrations to cover key procedures. Figure 18 provides an example demonstration from the participant guide.

![Demonstration Steps](image)

**Figure 18:** Event 5 Example from Chart of Accounts ILT
Event 6: Elicit Performance and Event 7: Provide Feedback

In practice, Events 6 and 7 are combined into one design treatment – a course that elicits performance (Event 6) should always provide feedback (Event 7); therefore, I have combined my discussion of these events. Event 6 applies to certain product types that include checkpoint questions or system activities to gauge the learners’ understanding of the course content. Event 6 describes the question or activity that the learners need to complete. After eliciting performance in Event 6, courses provide immediate feedback on that performance in Event 7. I included checkpoint questions to elicit performance and provide feedback in two of my projects – Business Automobile Revisions and Chart of Accounts Training. For the Chart of Accounts ILT, the classroom instructor displayed the question slides first, giving the learners time to answer the questions. Then the instructor displayed the correct responses and provided additional information to help learners understand the rationale behind the answers. Figure 19 shows an example question for the Chart of Accounts ILT with the correct response highlighted.

![Checkpoint](image)

Figure 19: Event 6 and 7 Example from Chart of Accounts ILT
**Event 8: Assess Performance**

Event 8 only applies to product types that include a formal assessment of the skills or knowledge the learners gained from the training. Event 8 goes beyond simple checkpoint questions or practice activities to actually “test” learners on the content. A common type of formal assessment is a series of graded questions, where learners must achieve a certain minimum score in order to pass the assessment and receive credit for taking the course.

During the internship period, I applied Event 8 to two courses – Business Automobile Revisions and Chart of Accounts Training. For the Business Automobile Revisions project, I wrote two assessment tests that learners had to pass in order to earn Continuing Education (CE) credit. **Figure 20** shows example questions from one of these courses.

---

**Welcome to the Continuing Education (CE) assessment for the Business Automobile and the Extended Coverage Endorsement - Business Automobile Plus course.**

To receive CE credit for this course, you must score a 70% or higher to pass the assessment. If you do not pass, you may retake the assessment.

1. The Business Auto Coverage Form covers accidents and losses during the policy period shown in the declarations and within the coverage territory, which may include parts of the world beyond the U.S. (and its territories), Puerto Rico and Canada if certain conditions are met.
   ☐ (a) True
   ☐ (b) False
   *If choice a is selected set score to 1.*

2. The Extended Coverage Endorsement - BAPlus adds which of the following coverages?
   ☐ (a) Common Damages
   ☐ (b) Diminution in Value
   ☐ (c) Drive Other Car
   ☐ (d) Electronic Accessories
   *If choice c is selected set score to 1.*

3. The insured uses the insured auto to transport large containers of a chemical. In transit, the tailgate on the back of the insured vehicle breaks and falls open. One of the containers falls out of the auto and spills the chemical onto the roadway. Is bodily injury or property damage caused by this incident covered under the Business Auto Coverage Form?
   ☐ (a) Yes. In this case, the Pollution exclusion does not apply, and bodily injury and/or property damage.
Event 9: Enhance Retention and Transfer to the Job

Event 9 is the final event and one of the most important. Instructional designers must help learners remember the key course content and take the appropriate steps to transfer new skills to their daily work activities. Job aids are one of the most effective tools for ensuring a smooth transition from training to job performance; however, the CDC considers job aids to be an additional deliverable, and we do not develop these for all courses. I did not create any new job aids during the internship, but I did include links to existing documentation. For the Chart of Accounts ILT, I helped the client to identify useful job aids, which were later developed by client system experts. I provided a link to these job aids and a high-level list of next steps for learners to follow (Figure 21).

Figure 21: Event 9 Example from Chart of Accounts ILT

Course Wrap-Up

Suggested Next Steps:
- Access the CoA Governance Portal to review available materials and tools.
- Familiarize yourself with the tools relevant to your role, using the available job aids.

Thank you for attending this training and for your support in making the CoA Governance project a success.
Concluding Thoughts on Gagné

Although Gagné maintains that training must include all nine events in order for learning to occur, my internship projects illustrate that in the real world of training development, courses may not include every event. Product type, budget and time constraints, and client specifications determined the events that I applied to my deliverables. That being said, Gagné’s theory is still valuable for instructional designers at the CDC, as it helps us to identify the components that training materials need in order to maximize knowledge transfer and retention.

Instructional Design and Technical Communication Parallels

Since I began my career at Accenture, I have been pleasantly surprised to discover just how well the MTSC program prepared me for success in the instructional design field. As I developed various deliverables for my internship projects, I continued to see a number of parallels between technical communication and instructional design. In contrast, there were some areas where I needed to develop new skills that I had not learned during my study of technical communication.

Technical Communication Skills Applied to Instructional Design

In this section, I describe some of the key technical communication best practices that I have applied in my role as an instructional designer.

Process for Developing Deliverables

When studying technical communication in the MTSC program, one of the first techniques I learned for creating any type of deliverable was Anderson’s Problem-Solving Model (Anderson, 1984). This model outlines five key activities a writer performs when addressing a specific “problem.” For instructional designers, the “problem” we address is the client’s specific training need. The CDC’s content development process outlines a series of phases for creating training materials that is similar to Anderson’s model.

In Table 4, I illustrate the parallels between the two models, focusing on similarities. Although the phases overlap and the specific steps the author performs vary between models, the overall flow of the steps that technical writers and instructional designers perform is similar.
<table>
<thead>
<tr>
<th>Anderson’s Problem-Solving Model</th>
<th>CDC Development Process</th>
<th>Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Problem</td>
<td>Planning Phase</td>
<td>Both models focus on defining the project requirements – including purpose and content topics.</td>
</tr>
<tr>
<td>• Specify purpose</td>
<td>• Identify course objectives</td>
<td>Both models emphasize careful audience analysis to determine what the audience needs to know and how best to present that information.</td>
</tr>
<tr>
<td>• Analyze content</td>
<td>• Review high-level content topics</td>
<td>At the CDC, IDAs may participate in early planning meetings to identify the course objectives, content topics, and audience analysis or they may simply review this information in the completed PLB.</td>
</tr>
<tr>
<td>• Analyze audience</td>
<td>• Gain solid understanding of learner audience</td>
<td></td>
</tr>
<tr>
<td>Design Solution</td>
<td>Planning Phase</td>
<td>Elements of Anderson’s Design Solution activity match up to components in three CDC development process phases.</td>
</tr>
<tr>
<td>• Make preliminary decisions about medium, form, style, production, distribution</td>
<td>• Review the PLB to understand the type of training we are creating and how we will deliver it</td>
<td>At the CDC, we make preliminary decisions about medium, form, style, etc. during the Planning phase as part of identifying the product type that is most appropriate for the training need.</td>
</tr>
<tr>
<td>• Gather information</td>
<td>• View product type descriptions and samples</td>
<td>The CDC’s Design and Production phases match closely with Anderson’s Design Solution activity. The key difference is that we often create two documents to draft the solution and design the finished product – the instructional design map and the content script.</td>
</tr>
<tr>
<td>• Draft solution</td>
<td>Design Phase</td>
<td>In the Production Phase, we create a draft of the complete training materials for the client to review.</td>
</tr>
<tr>
<td>• Design finished product</td>
<td>• Gather information from SME interviews and source content</td>
<td></td>
</tr>
<tr>
<td>• Produce pilot version or review copy</td>
<td>• Create an instructional design map or a detailed outline of the course, including instructional design treatment ideas</td>
<td></td>
</tr>
<tr>
<td>Production Phase</td>
<td>Production Phase</td>
<td></td>
</tr>
<tr>
<td>• Continue to gather content to fill in course details</td>
<td>• Continue to gather content to fill in course details</td>
<td></td>
</tr>
<tr>
<td>• Build a draft of the course (including a content script (if applicable to the project) and actual materials)</td>
<td>• Build a draft of the course (including a content script (if applicable to the project) and actual materials)</td>
<td></td>
</tr>
</tbody>
</table>
### Test Solution
- Design procedures for testing or review
- Present pilot version or review copy to sample of audience or to reviewers
- Gather responses
- Analyze them
- Recommend improvements in the solution

### Design Phase
- Send instructional design map or detailed outline for SME review
- Consolidate SME feedback and clarify the changes as needed
- Update course

### Production Phase
- Send content script for SME review (if applicable)
- Consolidate SME feedback and clarify the changes as needed
- Update the course
- Send draft of course materials for SME review
- Consolidate SME feedback and clarify the changes as needed
- Update course

### Acceptance Phase
- Send course materials for pilot testing and/or final acceptance testing
- Complete internal acceptance testing
- Consolidate SME feedback and clarify the changes as needed

### Implement Solution
- Revise the solution
- Produce it
- Package it
- Deliver it

### Acceptance Phase
- Make final updates

### Deployment Phase
- Provide final course materials to the client
- Deploy WBT courses to the LMS
- Deploy ILT courses to the appointed instructor

### CDC project work plans include SME review cycles at various stages of development. The goal is to catch errors and content gaps as early as possible, so that we have minimal changes to the completed course materials.

- When creating a course, we include reviews for:
  - Instructional design maps
  - Content scripts (if applicable)
  - Initial drafts of the completed course materials

- After the SMEs review the completed course materials, we update the course and provide a pilot or final testing version as part of the Acceptance phase.

### Anderson’s Implement Solution activity closely aligns with the final step of the CDC’s Acceptance phase and all steps within the Deployment phase.

- Both models include steps to finalize the deliverables and provide them to the client (or audience) in the agreed upon format.
<table>
<thead>
<tr>
<th>Evaluate Solution</th>
<th>Deployment Phase/Post-Deployment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Design an evaluation method</td>
<td>• Provide basic course evaluations to the learners (for both WBT and ILT)</td>
</tr>
<tr>
<td>• Use the method</td>
<td>• Collect evaluation scores over time and periodically review average scores</td>
</tr>
<tr>
<td>• Analyze results</td>
<td></td>
</tr>
<tr>
<td>• Formulate recommendations</td>
<td></td>
</tr>
<tr>
<td>• Make changes</td>
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</tbody>
</table>

- At the CDC, we have evaluation steps in place to determine the “success” of a training course, but there are some key differences between the CDC’s process and Anderson’s model:
  - The CDC has a general course evaluation template that we use for all courses. IDAs are not able to design a new evaluation method.
  - The CDC tracks evaluation scores over time as new learners take the course. The project manager receives periodic score updates, but does not always share these with the IDA, who may have already moved on to a new client.
  - We do not formulate recommendations for improving training materials nor do we update them after deployment. At some point, the client may hire the CDC to update a course, but we consider that a new project.

After practicing the Anderson model in the MTSC program, I felt very comfortable transitioning to the CDC’s content development process, which includes many of the same steps and considerations for developing successful communications.

**Persuasive Strategies**

Prior to starting my job at Accenture Learning, I did not expect to use the persuasive rhetoric techniques I learned in the MTSC program for training development; however, I quickly learned that appealing to the learners’ interests and gaining their support for process changes is essential to a successful training course. Learners are a captive audience in the sense that their job requires them to attend the training course and apply new skills and process steps in their daily work activities. Nevertheless, employees that understand the rationale behind changes and
can see how the changes may benefit them are most likely to quickly and fully learn and implement new skills and processes.

The CDC recommends that all training courses include “what’s in it for me” or “WIIFM” content to provide the rationale behind the changes described in the training and highlight the benefits of these changes for the learner. We include this content at the beginning of a course to help ensure that the training is well-received and to increase the chances that learners will participate fully in the course and retain the skills and knowledge they acquired. During my internship, I found that writing WIIFM content requires careful audience analysis and, in some cases, a positive “spin” to identify benefits that are not readily apparent.

**Client and SME Communications**

The MSTC program also prepared me for an instructional design career by giving me experience with effective techniques for communicating with clients and SMEs. Through several writing projects, I learned how to interview clients and SMEs to identify project requirements and content for writing the deliverables. Prior to client or SME interviews, I prepared lists of specific questions and carefully reviewed the questions to ensure that they would make good use of the client or SME’s time and help me to gather the information that I needed. I also learned basic strategies for keeping interviews on track, managing feedback from multiple sources, and developing a rapport with the client and SMEs. I use these skills on a daily basis when interacting with clients and SMEs on my training projects.

**Writing Quality**

The MTSC program taught me to write clearly and concisely and carefully revise and proofread my own writing – skills that I apply to my on-the-job communications and deliverables whenever possible. I apply technical communication guidelines when writing training materials and always carefully review my deliverables in order to:

- Catch and correct any spelling or grammatical errors
- Ensure that I am using active voice whenever possible and appropriate
- Improve consistency (in verb tense, naming conventions, and tone)
- Check for parallel structure in sentences and lists
- Reduce wordiness and redundancy

However, I should acknowledge a couple of challenges that I have encountered when writing training materials:
• **Courses that require passive voice:** I have worked on a number of courses where the client preferred or even required that I use the passive voice. Two key examples are:
  o Courses about insurance procedures and coverages – Even in internal training documents, the client wanted to avoid assigning responsibility for payments, reimbursements, and other items. Although using the passive voice to avoid assigning responsibility is one of its accepted applications, I did feel that this requirement reduced the overall clarity and quality of my writing.
  o Courses describing undeveloped processes – I have worked on several change management or system training projects where the processes and systems are still in progress. As a result, I have been forced to use passive voice because the SMEs had yet to determine which employees would complete certain tasks.

• **“Wordsmithing” by client stakeholders and SMEs:** While most client stakeholders and SMEs are happy to contribute content expertise and let the IDA write the course, some reviewers provide extensive editorial feedback and want to see their exact wording in the finished course. In this situation, I have questioned changes that I thought were unnecessary or would reduce the clarity and quality of the training materials. However, the client has the final say on the deliverables, and I have deployed courses with wording that was not up to my personal standards.

As I gain more experience as an instructional designer, I continue to appreciate the versatility of the MTSC degree and how well the skills I gained in this program apply to my career in training development.

**Instructional Design-Specific Skills I Developed**

Although the MTSC program prepared me well for the instructional design field, there were a few areas in which I needed to develop new skills to create training deliverables.

**Writing Style and Deliverable Formats**

When I started working as an instructional designer, I had to quickly adapt my writing style and document organization techniques to fit a training format. Much of the writing that I did in the MTSC program was fairly formal and followed a standard report structure, whereas training materials often have a more informal, conversational tone and less straightforward structure. When writing for training courses, I needed to adapt my style to fit formats like click-
to-reveals (where users click links to view additional information), Flash animations, checkpoint questions, and discussion questions.

**Scenarios and Case Studies**

My technical writing experience taught me to use examples to support content or to make a point; however, I did not learn how to develop detailed scenarios or case studies, which are a key part of many Accenture Learning product types. While working on deliverables like the demonstration guide for Medicare Reporting, I learned how to work with SMEs to develop realistic scenarios around which to structure training activities.

**Development Tools**

The MTSC program taught me how to get the most out of basic Microsoft applications like Word and PowerPoint, and I used these programs daily during my internship. However, since beginning my career in instructional design, I have learned to use a variety of development tools including Articulate Presenter, Adobe Presenter, iAuthor and the Learning Content Management System (both are web-development tools for WBT courses), Raptivity (for creating Flash interactions), and Captivate (for recording simulations for systems training).

**Final Reflection**

During my internship period at Accenture Learning’s Chicago CDC, I worked on a diverse set of projects that gave me the opportunity to create new product types, design a variety of instructional design treatments, and apply technical communication skills to create effective, audience-focused training materials. Due to the CDC’s limited pipeline of new work at the time of my internship period, the activities that I completed were not always consistent with my typical job duties as an instructional designer. This being the case, I found that I was able to adapt my instructional design and technical communication skills to non-standard projects and deliverables. Although I had been working for the CDC prior to the internship period, I found that the internship experience encouraged me to closely analyze the process that I follow and skills that I apply when creating training – giving me a better understanding of the instructional design field and its close ties to technical communication.
REFERENCES


## APPENDIX A – REPORT ACRONYMS

**Project:** All  
**Description:** This appendix lists the key Accenture Learning and instructional design acronyms that I use in this report.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Phrase/Complete Name</th>
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</thead>
<tbody>
<tr>
<td>AL</td>
<td>Accenture Learning</td>
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<tr>
<td>BI</td>
<td>Business Interlock</td>
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<tr>
<td>BPO</td>
<td>Business Process Outsourcing</td>
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<td>CDC</td>
<td>Content Development Center</td>
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<td>CE</td>
<td>Continuing Education</td>
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<td>HR</td>
<td>Human Resources</td>
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<td>IDA</td>
<td>Instructional Design Analyst</td>
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<td>IDL</td>
<td>Instructional Design Lead</td>
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<td>IDM</td>
<td>Instructional Design Manager</td>
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<td>ILT</td>
<td>Instructor-Led Training</td>
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<tr>
<td>LMS</td>
<td>Learning Management System</td>
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<tr>
<td>PLB</td>
<td>Preliminary Learning Brief</td>
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<tr>
<td>SME</td>
<td>Subject Matter Expert</td>
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<tr>
<td>WBT</td>
<td>Web-Based Training</td>
</tr>
<tr>
<td>WIIFM</td>
<td>What’s In It For Me</td>
</tr>
</tbody>
</table>
APPENDIX B – ACCENTURE COMPENSATION TOOL DESIGN PHASE DELIVERABLES

Project: Accenture Compensation Tool

Description: In this appendix, I describe the three key deliverables I created during the Design phase of the Accenture Compensation Tool project.

Training Plan

This document was a high-level plan for the training that Accenture will deliver with the Compensation Tool. To create this deliverable, I:

- Drafted the document based on a high-level document that the training team created during the Analysis phase.
- Added detail on scope, audience, objectives, timelines, and deliverables.
- Confirmed details with SMEs and revised the plan as needed.

The image below shows a section of the training plan where I identified the main training courses and the intended audiences for each.
Training Design

The Training Design was a PowerPoint presentation describing additional details around the training employees will need when their companies implement the Compensation Tool, including specific topics and product types. When developing this presentation, I:

- Created diagrams to map the logical sequences of training for key audience groups.
- Identified specific modules and topics for each training course and added this detail to the presentation.
- Suggested activities and delivery methods for the training courses.
- Confirmed details with SMEs and revised the presentation as needed.

The image below shows one slide from the presentation. On this slide, I identified the learning objectives for the Administrators audience and listed the suggested training modules or chapters the training should include.
Configuration Design

This deliverable was a PowerPoint presentation to introduce Accenture resources to basic configurations that they may need to implement when customizing the Compensation Tool for client use. To create this presentation, I:

- Modified existing workflow graphics and created new workflows in Microsoft Visio to illustrate the processes associated with the key user scenarios that I developed previously.
- Imported these graphics as image files into the Configuration Design PowerPoint presentation (the final deliverable).
- Reviewed the presentation and edited the text, organization, and visual design to improve clarity, consistency, and professionalism.

The image below is an example slide from this presentation, where I summarized the process for one manager task and created a visual representation of the main actors, actions, and outputs for this process.
Appendix C – Compensation Tool User Guide Template

Project: Accenture Human Resources Compensation Tool

Description: In this appendix, I include a few pages from the Compensation Tool User Guide. I used a variety of styles to differentiate between main and sub-headings, body text, and notes. I chunked related headings, text, and graphics to provide visual cues as to the document structure and included plenty of white space.

Approving Recommendations

Higher-level managers are responsible for approving recommendations that are submitted by lower-level managers.

In Accenture Compensation, managers do not reject recommendations; instead, they modify the recommendations as needed prior to approving or return the recommendations to the lower-level manager for revision.

Note: In addition to approving recommendations, 2nd and 3rd-level managers are also responsible for entering pay recommendations for their direct reports as described in the Entering Pay Recommendations section of this guide.

When there are recommendations awaiting your approval, you will see this task in the My Tasks section of the Home page. In Figure 12 below, you can see the You have <x> compensation recommendations to review task. Click this task to navigate to the Compensation Recommendations Worksheet, where you will approve the recommendations.

Figure 12: Approval Task

Approving Recommendations – 2nd-level Manager

When you first navigate to the Compensation Recommendations Worksheet, you will see the compensation data only for your direct reports.

You will need to change the worksheet filter in order to view the recommendations that are awaiting your approval. To do so, select the appropriate group of reports from the View By Filter (Figure 12).

Figure 13: View By Filter
After selecting the correct view of the Compensation Recommendations Worksheet, complete the following steps:

1. Review the pay recommendations for all employees.
2. Check to see if any of the employee recommendations are marked with a red flag in the Alerts column. The red flag indicates that one or more of the recommendations for that employee do not meet the compensation process guidelines.
   a. If there are no red flags, continue to Step 3.
   b. If there is a red flag:
      i. Roll your mouse over the flag to display the reason for the alert (Figure 14).
      ii. Click the Note icon to the right of the flag to see if the 1st-level manager entered a note to explain the reason for the exception (Figure 14).
      iii. Click the OK button to close the note.

3. Select the recommendations you want to approve and send for the next level of approval (if applicable):
   a. To select recommendations for the entire team (recommended), select the checkbox in the upper left corner of the worksheet (Figure 15).
   b. To select recommendations for specific employees, select the individual checkboxes for those employees (Figure 15).

4. Click the Submit button at the top of the screen to send the recommendations to the 3rd-level manager for approval.
Returning Recommendations for Revision – 2nd or 3rd-level Manager

When you do not agree with pay recommendations proposed by lower-level managers, you can either edit the recommendations yourself prior to approving (see the Entering Pay Recommendations section of this guide for details on updating the fields) or you can send the recommendations for an individual employee back to the manager for revision.

To return recommendations for revision, complete the following steps, starting from the Compensation Recommendations Worksheet:

1. Select the name of an individual employee on the worksheet. The Recommendation Detail window for that employee displays.
2. In the Details/Actions section, select the Send this recommendation back to the manager for revision link (Figure 17). The manager will see a task in My Tasks telling him or her to revise the recommendation and resubmit for approval.

Approving Recommendations – 3rd-level Manager

On the Compensation Recommendations Worksheet, 3rd-level managers can view the budget and total compensation value recommended for a department or business unit.

In addition, you can recommend compensation for your direct reports, indirect reports, 2nd-level direct reports, or other employees.

Figure 18 below shows features of a department or business unit Compensation Recommendations Worksheet.
APPENDIX D – BUSINESS AUTOMOBILE REVISIONS ASSESSMENT

**Project:** Business Automobile Revisions

**Description:** I wrote assessment tests to accompany the Business Automobile courses. Agents taking the training had the opportunity to earn Continuing Education (CE) credit if they completed and passed the assessment. This appendix displays one of the assessments.

Welcome to the Continuing Education (CE) assessment for the Business Automobile and the Extended Coverage Endorsement - Business Automobile Plus course.

To receive CE credit for this course, you must score a 70% or higher to pass the assessment. If you do not pass, you may retake the assessment.

1. The Business Auto Coverage Form covers accidents and losses during the policy period shown in the declarations and within the coverage territory, which may include parts of the world beyond the U.S. (and its territories), Puerto Rico and Canada if certain conditions are met.
   - *(a) True*
   - *(b) False*

   *If choice a is selected set score to 1.*

2. The Extended Coverage Endorsement - BA Plus adds which of the following coverages?
   - *(a) Common Damages*
   - *(b) Diminution in Value*
   - *(c) Drive Other Car*
   - *(d) Electronic Accessories*

   *If choice c is selected set score to 1.*

3. The insured uses the insured auto to transport large containers of a chemical. In transit, the tailgate on the back of the insured vehicle breaks and falls open. One of the containers falls out of the auto and spills the chemical onto the roadway. Is bodily injury or property damage caused by this incident covered under the Business Auto Coverage Form?
   - *(a) Yes - In this case, the Pollution exclusion does not apply, and bodily injury and/or property damage would be covered.*
   - *(b) No - In this case, the Pollution exclusion does apply, and bodily injury and/or property damage would not be covered.*

   *If choice b is selected set score to 1.*

4. Which of the following are Liability Exclusions included in the Business Auto Coverage Form? Select two correct answers.
   - ✔ *(a) Workers’ Compensation*
   - ☐ *(b) Towing*
   - ☐ *(c) Supplementary Payments*
   - ✔ *(d) Completed Operations*

   *If choice a is selected AND choice b is NOT selected AND choice c is NOT selected AND choice d is selected set score to 1.*

   Anything else No score defined.
5. Which of the following statements accurately describes the Business Auto Coverage Form?
   - (a) The form provides numeric symbols to describe the autos that may be covered autos.
   - (b) The form does not describe physical damage coverage for covered autos.
   - (c) The form does not provide definitions for commonly used terms for describing coverages.
   - (d) The form provides links to closely related forms that describe additional coverages.

   If choice a is selected set score to 1.

6. According to the Liability Coverage section of the Business Auto Coverage Form, which of the following is an insured?
   - (a) An employee for a covered auto that the employee owns
   - (b) A business partner with or without the insured’s permission
   - (c) Someone using a covered auto with the insured's permission
   - (d) All of the above

   If choice c is selected set score to 1.

7. Which of these statements about the Extended Coverage Endorsement - BA Plus are true? Select three correct answers.
   - (a) The endorsement provides new coverage for Supplementary Payments.
   - (b) The endorsement revises the definition of bodily injury to include mental injury.
   - (c) The endorsement extends Hired Auto Coverage to international locations.
   - (d) The endorsement broadens the definition of Who is an Insured.

   If choice a is NOT selected AND choice b is selected AND choice c is selected AND choice d is selected set score to 1.
   Anything else No score defined.

8. Which statement below is true of covered losses for physical damage?
   - (a) Loss from auto overturn is included.
   - (b) Loss from hitting a bird or animal is included.
   - (c) Loss from tire blowouts is included.
   - (d) Loss from tire damage other than blowouts is included.

   If choice b is selected set score to 1.

9. Bankruptcy will relieve  of any obligations under the coverage form.
   - (a) True
   - (b) False

   If choice b is selected set score to 1.

10. Under the Extended Coverage Endorsement - BA Plus, what is the deductible for each hired vehicle?
    - (a) $700
    - (b) $250
    - (c) $500
    - (d) $1,000

    If choice c is selected set score to 1.
11. Which of the following coverages are modified by the Extended Coverage Endorsement - BA Plus? Select three correct answers.

- (a) Hired Auto
- (b) Towing
- (c) Glass Breakage
- (d) Transportation Expense

*If choice a is selected AND choice b is NOT selected AND choice c is selected AND choice d is selected set score to 1. Anything else No score defined.

12. CNA may pay up to _____ per day up to a maximum of _____ for temporary transportation expense incurred because of the total theft of a private passenger covered auto.

- (a) $40, $800
- (b) $20, $500
- (c) $15, $600
- (d) $20, $600

*If choice d is selected set score to 1.

13. Under the Extended Coverage Endorsement - BA Plus, what is the limit CNA may pay for any one accident or loss for a hired auto?

- (a) $50,000
- (b) $75,000
- (c) $25,000
- (d) $30,000

*If choice a is selected set score to 1.

14. What is CNA’s obligation to defend the insured against a suit?

- (a) To defend any insured against a suit seeking damages or a covered pollution cost or expense to which the insurance does not apply
- (b) To defend any insured against a suit asking for damages or a covered pollution cost or expense to which the insurance applies
- (c) To defend any lessee or borrower against a suit seeking damages or a covered pollution cost or expense to which the insurance applies
- (d) To defend anyone who is not the insured's employee, partner or member against a suit seeking damages or a covered pollution cost or expense

*If choice b is selected set score to 1.

15. CNA may pay up to $2,000 for cost of bail bonds.

- (a) True
- (b) False

*If choice a is selected set score to 1.
16. Which of the following are true of the Employee Indemnification and Employer's Liability exclusion? Select two correct answers.

- (a) Bodily injury to the spouse, child, parent, brother or sister of the insured's employee is not covered.
- (b) [ ] may share damages with or repay someone else who must pay damages because of the injury.
- (c) This liability only applies when the insured is liable.
- (d) This exclusion does not apply to bodily injury to domestic employees that are not entitled to workers' compensation benefits.

If choice a is selected AND choice b is NOT selected AND choice c is NOT selected AND choice d is selected set score to 1.
Anything else No score defined.

17. If the insured carries Comprehensive Coverage for the damaged covered auto, [ ] may pay for which of the following?

- (a) Glass breakage
- (b) Loss caused by hitting a bird or animal
- (c) Loss caused by falling objects or missiles
- (d) All of the above

If choice d is selected set score to 1.

18. Which types of electronic devices are covered under the Business Auto Coverage Form? Select two correct answers.

- (a) Electronic equipment for detecting speed equipment
- (b) Electronic equipment that receives or transmits audio, visual or data signals not designed solely for the reproduction of sound
- (c) Equipment and accessories designed solely for the reproduction of sound that are permanently installed
- (d) Electronic equipment that is necessary for the normal operation or monitoring of the covered auto

If choice a is NOT selected AND choice b is NOT selected AND choice c is selected AND choice d is selected set score to 1.
Anything else No score defined.

19. Which of the following are some of the deductible options for Comprehensive and Collision Coverage? Select three correct answers.

- (a) $1,500
- (b) $250
- (c) $500
- (d) $5,000

If choice a is NOT selected AND choice b is selected AND choice c is selected AND choice d is selected set score to 1.
Anything else No score defined.
20. Comprehensive Coverage deductibles shown in the declarations apply to loss caused by fire or lightning.
   □ (a) True
   □ (b) False
   
   *If choice b is selected set score to 1.*

21. The Extended Coverage Endorsement - BA Plus provides Hired Auto Physical Damage Coverage up to ______, and the related deductible is ______.
   □ (a) $50,000, $500
   □ (b) $100,000, $500
   □ (c) $250,000, $2,500
   □ (d) $500,000, $5,000
   
   *If choice a is selected set score to 1.*

22. The Extended Coverage Endorsement - BA Plus enhances Liability Coverage by doing which of the following? Select three correct answers.
   ✓ (a) Broadening the definition of Who is an Insured
   ☐ (b) Expanding the criteria used to determine Completed Work
   ✓ (c) Increasing the amount of existing Supplementary Payment extensions
   ✓ (d) Removing the Fellow Employee exclusion
   
   *If choice a is selected AND choice b is NOT selected AND choice c is selected AND choice d is selected set score to 1.*
   *Anything else No score defined.*

23. Which of the following statements about the Extended Coverage Endorsement - BA Plus are true? Select two correct answers.
   ☐ (a) BA Plus enhancements are "ala carte" - customers choose the coverage they want.
   ☐ (b) BA Plus pricing is based on risk exposure for individual coverages selected.
   ✓ (c) BA Plus is a cost-effective alternative to purchasing individual coverages.
   ✓ (d) BA Plus offers a variety of coverage modifications and enhancements.
   
   *If choice a is NOT selected AND choice b is NOT selected AND choice c is selected AND choice d is selected set score to 1.*
   *Anything else No score defined.*

24. Which of the following is NOT a general condition of the Business Auto Coverage Form?
   ○ (a) Liberalization
   ○ (b) Loss Payment
   ○ (c) Premium Audit
   □ (d) Deductible Option
   
   *If choice d is selected set score to 1.*
APPENDIX E – MEDICARE REPORTING DEMONSTRATION GUIDE

Project: Medicare Reporting Training

Description: This appendix provides three sample pages from the Medicare Reporting Demonstration Guide. The instructor used this guide to demonstrate key procedures during the classroom session.

Document Introduction and Purpose

The purpose of this document is to provide the facilitator with specific points that should be communicated and demonstrated during the training. To conduct this demonstration, you’ll need the following:

- A copy of the new data collection/interview form for claim adjusters (for your reference)

  Note: Copies of the new data collection/interview form for claim adjusters (to distribute to participants) Adjusters may use the data capture form to capture or confirm this data and then enter the information in Claim Center.

- Access to the Claim Center training/test environment

  - URL:(https://xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx)
  
  - Adjuster Login: ID – , Password - 

  Note: This is a training/test environment. It includes material not currently in Claim Center, but that which may appear in a future enhancement of Claim Center.

- Sample claim numbers that will allow you to demonstrate each of the new data fields

Sample Claim Numbers and Notes

Use this section to document claim numbers that will be used during the demonstration, as well as notes about any specific fields or points that will be addressed.

- Workers’ Compensation: WC Medical claim (# ), WC Medical Indemnity claim (# )

- General Liability: GL claim (# ), GL MedPay claim (# )

- Auto: Auto claim (# ), Auto MedPay claim (# ), Auto PIP claim (# )

Demonstration Instructions

This section of the document is organized by the type of information that needs to be collected on the data capture form and then entered into Claim Center. For each type of information, you will receive instructions for:

- Discussing each section of the new data collection/interview form for claim adjusters

- Demonstrating the new data fields in Claim Center

- Encouraging audience interaction throughout the training to ensure an effective learning experience

At the beginning of the demonstration, please explain to participants that you will focus only on
those data fields that are new to Claim Center or that have been modified as a result of new Medicare reporting requirements. The demonstration does not cover every field that adjusters will need to confirm or complete in their daily work.

### Demonstration Script – Section 1: Claimant /Medicare Beneficiary Information

#### Five Key Fields

**Key messages:**

- Centers for Medicare and Medicaid Services (CMS) needs five key pieces of information to verify a claimant’s eligibility for Medicare benefits: **First Name, Last Name, Date of Birth, Social Security Number (SSN) and Gender.** *(Create a Flip Chart list of these for everyone to see during the training)*

- Some or all of this information may be captured by the First Notice of Loss (FNOL) team when the claim is first reported. If an adjuster receives a claim that does not include these five data points, then the adjuster must complete the fields.

  > **Note:** Workers’ Compensation (WC) claims are likely to be more complete than non-WC claims when they reach the adjuster. Date of Birth, SSN, and Gender are often missing for non-WC claims.

- These data fields are not new to Claim Center; however, non-WC audiences may be unaccustomed to gathering and entering SSNs.

- To the extent possible, all adjusters must make every attempt to gather a claimant’s SSN or Tax ID number and enter it in the appropriate field.

**Review data capture form:**

- Point out the first section of the data capture form – **Claimant/Medicare Beneficiary Information.**

- The first four items in this section correspond with the five key data fields in Claim Center.

**Demonstration steps:**

- **Claims to use for demonstration:** Any of the claim numbers in the **Sample Claim Numbers and Notes** section of this guide will work for this portion of the demonstration.

- Navigate to the **Parties Involved** screen within the claim file.

- Select the claimant’s name from the list of contacts to display data about the claimant.

- Click the **Edit** button to make the claimant data editable.

- In the **Name** section of the screen, highlight these fields that users should complete or confirm:
  
  - **Last Name**
  
  - **First Name**

- In the **Additional Info** section of the screen, highlight these fields that users should
complete or confirm:

- **Tax ID (SSN/TIN)** – This is where adjusters will enter the claimant’s SSN or TIN, if provided. They may also select Yes or No from the **SS# Released** drop-down menu to indicate whether or not the information was provided (for reporting purposes).

- **Gender**

- **Date of Birth**

**Note:** IMPORTANT – EMPHASIZE …. Typically, FNOL will enter a default date (01/01/1910), rather than collecting the actual date of birth. Adjusters will need to add the actual date of birth obtain date if FNOL only provided the default.

💡 **Tip:** Be prepared to answer possible questions, such as those below:

**Q:** “What should I do if the claimant does not provide his/her SSN/TIN?”

**A:** If the claimant does not provide his or her SSN, but does provide the Medicare HICN, populate the **Tax ID (SSN/TIN)** field with spaces so that you will not receive an error when you submit the claim updates.

In those rare instances where the claimant refuses to provide information and refuses to sign the Medicare Verification Form, adjusters and claim processors must escalate this issue. Claims management will need to decide whether there is a reasonable likelihood that the claimant is a Medicare Beneficiary (i.e. older claimant) and is willing to take the risk of a potential Medicare fine. Please note, we are not required to report information on the following scenarios:

- For WC only, if the On Going Responsibility for Future Medicals (ORM) is less than $600
- For non-WC there are no minimum dollar threshold for ORM
- If the Total Payment Obligation to the Claimant (TPOC) is more than $5,000
APPENDIX F – CHART OF ACCOUNTS ILT MATERIALS SAMPLE

Project: Chart of Accounts Training

Description: In this appendix, I provide a sample section from the two main ILT deliverables – the course PowerPoint presentation and the corresponding instructor/participant guide.

PowerPoint Presentation

Module Two – Data Owner Role and Responsibilities
CoA Governance and Data Owners

- Key features of CoA Governance
  - Includes the people, processes, tools, and guidelines to introduce, administer, and maintain the global CoA
  - Implements formal processes for identifying, approving, and administering changes to governed CoA Values, tracking issues, and measuring performance

One of the key process changes for CoA Governance is the addition of the Data Owner and Process Owner roles. Local Requestors and Approvers now have to obtain higher approval to update governed CoA Values.

Data Owner Role

- “Own” specific governed CoA Values
- Review and take action on change requests to ensure that only necessary changes are made to the CoA and LBORs
  - Routine requests
  - Mass requests
- Report issues
- Review performance metrics
Breakdown of Governed CoA Values

- Data Owners for both Enterprise and PeopleSoft Data Values
- PeopleSoft Values require Data Owners from each segment

Because the Data Owner role is so essential...

You may have a backup Approver to ensure that we meet goals for reviewing requests, even when you are unavailable. If you do not have a backup Approver, you should let the Process Owner know when you will be unavailable.

Questions You May Have

- Why is the Data Owner role important?
  - Data Owners sustain the new, global CoA
  - Data Owners ensure that all changes have a real business purpose and impacts are assessed before a change is made.
  - Data Owners are very actively involved in the process.
  - Data Owners take significant ownership of the CoA Governance effort.

- Why was I identified as a Data Owner?
  - You are a key stakeholder affected by the downstream impacts of changes.
  - With your approval role, you have a better line of sight to changes and can help ensure the process runs as it should.
CoA Governance and Data Owners

CoA Governance includes the people, processes, tools, and guidelines to introduce, administer, and maintain the global CoA.

The project implements formal processes for identifying, approving, and administering changes to governed CoA Values; tracking issues; and measuring performance.

One of the key process changes for CoA Governance is the addition of the Data Owner and Process Owner roles.

Local Requestors and Approvers now have to obtain higher approval to update governed CoA Values.
Data Owner Role

Data Owners:
- “Own” specific governed CoA Values
- Review and take action on change requests to ensure that only necessary changes are made to the CoA and LBORs
- Report issues
- Review performance metrics

**Trainer Notes**

*Explain what we mean by “owning” a governed CoA Value. Essentially, this means that the Data Owner is responsible for maintaining this value. All changes to the value must be approved by the Data Owner.*

*This slide includes an organizational chart that shows where Data Owners fit within CoA Governance. Participants will have already seen the same chart in the prerequisite course.*

Breakdown of Governed CoA Values

Some points to understand about your role:
- There are Data Owners for both Enterprise and PeopleSoft governed values.
- PeopleSoft Values require Data Owners from each segment.
- You may have a backup Approver to ensure that we meet goals for reviewing requests, even when you are unavailable. If you do not have a backup Approver, you should let the Process Owner know when you will be unavailable.

**Trainer Notes**

*Quickly go over the table on this slide to explain how ownership of governed CoA Values is broken down.*

*Participants should be able to identify which governed values they “own” based on this table.*
Explain that change request processing is guided by goals for how long the process is expected to take/turnaround time for accepting or rejecting requests. Some Data Owners have backup Approvers to ensure the goals are met. Requests should be reviewed and processed within 48 hours.

**Questions You May Have**

Why is the Data Owner role important?

- Data Owners sustain the new, global CoA.
- Data Owners ensure that all changes have a real business purpose and impacts are assessed before a change is made.
- Data Owners are very actively involved in the process.
- Data Owners take significant ownership of the CoA Governance effort.

Why was I identified as a Data Owner?

- You are a key stakeholder affected by the downstream impacts of changes.
- With your approval role, you have a better line of sight to changes and can help ensure the process runs as it should.

**Questions You May Have (Continued)**

What is an example of how account structure is changing?

- The current 10-digit account number will exist in Hyperion and PeopleSoft as a 5-digit account.
- When additional detail is required to support reporting, a subaccount will be established in PeopleSoft.

**Trainer Notes**

If participants would like to see examples that show how things are changing, refer to the ILT Examples Excel spreadsheet.
APPENDIX G – CHART OF ACCOUNTS eBRIEFING FEEDBACK FORM

**Project:** Chart of Accounts Training

**Description:** This appendix shows a portion of the pilot review feedback form for the Chart of Accounts eBriefing course. I used this form to collect pilot feedback and track my follow-up actions and status.

<table>
<thead>
<tr>
<th>Slide #</th>
<th>Page Title</th>
<th>Observation/Issue</th>
<th>Accenture Follow-Up</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 of 27</td>
<td>Scope</td>
<td>Debbie: What are “Enterprise Values”?</td>
<td>Define Enterprise Values. Follow up with Jeff</td>
<td>Complete except for audio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kim: How will local accounting staff know where these fields are?</td>
<td><strong>Kim– recommended solution:</strong> Provide brief explanation of fields. Follow up with Jeff.</td>
<td></td>
</tr>
<tr>
<td>8 of 27</td>
<td>Impacts</td>
<td>Tom: Deadline must be communicated and consequences of missing the deadline. Discuss how requests will be handled after the deadline.</td>
<td>From Dorie: Is including the deadline in the training sufficient? I don’t know if we actually want to get into detail about how requests will be handled after the deadline. From Dorie: Two working days prior to last working day of the month, as stated in the course. Turnaround time covered later in the course.</td>
<td>No change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kim: 2 working days prior to the end of the month? What is the normal turn-around time? Has that timeframe been verified?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 of 27</td>
<td>CoA Governance Processes</td>
<td>Rino: Reference to CCO Portal. What is this portal? Does it currently exist?</td>
<td>Clarify portal availability and usage in resources or supporting job aids as needed to provide learners with the appropriate level of context. No change</td>
<td>Complete except for audio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Galina: RE – CoA Governance Request Management vs. Governance. Current worklist difference is not clear enough.</td>
<td>From Dorie: We can write out what CCO stands for. Didn’t realize that this audience would not know about the CCO portal… Include appropriate screenshot? From Dorie: I don’t suggest adding a screenshot. Can make link wording clearer that the learner can access these tools by going</td>
<td></td>
</tr>
<tr>
<td>Page</td>
<td>Section</td>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>---------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 12 of 27 | Exceptions Processing | Stuart: Validate that when “Roles Involved” appears, the timing is accurate and that bullets are not flashing too quickly.  
From Dorie: Will read the bullets as part of the audio.  
Made same change for slides 14, 17, and 21  
Complete except for audio re-record  
Be sure to rerecord audio for all four slides. |
| 13 of 27 | Simplified Process - Exceptions | Debbie: RE – “CoA Governance Administrator contacts Local Approver” – Rethink wording of “approved” and context of “exception”.  
Galina: Needs further clarification. From Dorie: Comment is too vague. Not able to address.  
Erik: Give example to exceptions.  
Should “exception” be replaced with “account”? Discuss wording with Brian and Kathy. One wording change  
Erik– recommended solution: LBOR account is added to Plant (BAAN) ledger directly Because it’s day 5 of close and workflow is started after the fact. From Dorie: Need SMEs to confirm that this is an appropriate example.  
Complete except for audio (12 and 13) |
| 14 of 27 | Routine Change Processing | Debbie: Which fields are considered routine?  
Stuart: When “Roles Involved” appears, the timing  
From Dorie: I don’t think that it’s the fields that are routine, it’s just that a request is routine when it is for 10 or fewer changes. Have SMEs confirm.  
Determine if “routine” fields are discussed in prerequisite training or information  
Complete except for audio |
<table>
<thead>
<tr>
<th>Anonymous: further specify that it is an online form.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correct timing on &quot;Roles Involved&quot;. Add slight pause before the next slide.</td>
</tr>
<tr>
<td>Complete except for audio</td>
</tr>
</tbody>
</table>

is off. Bullets flash too quickly not enabling the learner to see who is actually involved.

Examples of routine requests: new accounting addition, new cost center, new department, new subaccount, new material price variance
APPENDIX H – CHART OF ACCOUNTS eBRIEFING FINAL COURSE

**Project:**  Chart of Accounts Training

**Description:**  In this appendix, I provide a large sample of the Chart of Accounts eBriefing course.

Welcome to the Chart of Accounts Governance Process Fundamentals course.

During this course, you will learn about Chart of Accounts (or CoA) Governance project, focusing on the process changes related to CoA Governance.

This course is intended for all roles that will be impacted by these changes.
Take a moment to become familiar with the navigation options in this course.

To move forward or backward in the presentation, you may use the Next or Back buttons in the control bar at the bottom of the screen. You may also click the slide titles in the Outline sidebar on the left side of your screen to move directly to any slide in the presentation.

If you do not see the outline, click the View button to reveal this sidebar.

This presentation includes audio narration on most slides. If you choose not to listen to the audio or would like to follow along with the narration, click the Notes tab if you do not have audio or would like to read the audio transcript.
Welcome from Chart of Accounts Owner

Hello, and welcome to the CoA Governance Process Fundamentals training.

As you may be aware, [Company Name] has implemented a number of important changes to improve the efficiency of our finance operations. These changes are all part of the larger Finance Transformation program. The Chart of Accounts Governance project is one of the key components of Finance Transformation. Implementing a robust, comprehensive CoA Governance process for our new global Chart of Accounts is a significant investment in our future.

Your support and participation in the new processes outlined in this course are essential to the success of the project. However, the new governance “process” is just a framework. The real benefit is your comprehension and compliance with the framework.

Thank you for your time and your attention to this important training.
Course Purpose and Objectives

- Explain the changes being made to the CoA and the benefits associated with these changes
- Describe the roles associated with maintaining the CoA
- Describe the CoA Governance processes at a high level and identify where your role fits within the processes
- Identify the reference materials available to you in support of the CoA Governance approach
Finance Transformation Recap

Finance Transformation (FT):
- Program to strengthen accounting and finance processes and systems to improve accuracy and timeliness in reporting financial information
- Includes four key themes

![Chart of Accounts Governance Process Fundamentals](chart.png)
CoA Governance Overview

The CoA project includes a number of activities to improve financial data reporting:

- Creating a global CoA
- Establishing new CoA Governance processes
- Implementing new tools to support the processes
- Mapping local books of record (LBORs) to the global CoA
Scope

Certain “governed” CoA Values are in scope for CoA Governance.

<table>
<thead>
<tr>
<th>Enterprise values</th>
<th>PeopleSoft values</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Book Code</td>
<td>• Subaccount</td>
</tr>
<tr>
<td>• Business Unit</td>
<td>• Program</td>
</tr>
<tr>
<td>• Operating Unit</td>
<td>• Product</td>
</tr>
<tr>
<td>• Account</td>
<td>• Department</td>
</tr>
<tr>
<td>• Affiliate</td>
<td>• Site</td>
</tr>
<tr>
<td>• Operating Unit Affiliate</td>
<td></td>
</tr>
<tr>
<td>• Transaction Type</td>
<td></td>
</tr>
</tbody>
</table>

Click here to view descriptions of each value.
Impacts

Overall, the impact of the CoA Governance project is expected to be minimal.

Impact on LBORs:
- Routine changes to CoA Values facilitated via an online form and approval workflow
- New request deadlines in place
- Issue reporting and escalation now formalized processes
- Exceptions identified and monitored on daily basis
Understanding the CoA Governance roles described on this slide will help you to better follow the process workflows that you will see later in this course.

Let’s start with the new roles created for CoA Governance. These roles were established to monitor and maintain the policies and procedures related to CoA Governance.

The CoA Owner is the key stakeholder responsible for the new, global CoA and the head of the CoA Governance organization.

The Process Owner manages the CoA Governance processes.

To view descriptions of each role, access the Role Definitions list. To view the specific people assigned to these roles, access the Roles and Contacts list.
CoA Governance Processes

Key tasks for CoA Governance include:

- Change Request Processing:
  - Exceptions
  - Routine Change Requests
  - Mass Change Requests

- Issue Management
- Performance Reporting

Detailed workflows for each process are available on the CoA Governance Portal.

Click here to access these workflows.
CoA Governance Tools

Tools
- CoA Governance Portal
- CoA Governance Request Management
- CoA Governance Worklist
- Mass Change Request
- Issue Management
- Performance Reporting
  - Hyperion DRM

For more information and to access these tools, please see Related Tools and Templates
Exceptions Processing

Activity Description:
When changes to governed CoA Values that do not follow prescribed CoA Governance processes are identified through the Data Warehouse exception reporting process, these exceptions are reviewed and either logged as issues or processed as mass or routine change requests.

Frequency:
Monitored daily; reviewed and processed as needed

Roles Involved:
- CoA Governance Administrator
- Local Approver
- Data Owner
- CoA Governance Process Owner

To learn more about the specific tasks associated with this process, please access the job aids available on the CoA Governance Portal.
Simplified Process - Exceptions

When an exception is identified:

CoA Governance Administrator contacts Local Approver to obtain an explanation for why he or she approved the account.

CoA Governance Administrator, CoA Data Owner(s), and CoA Governance Process Owner review the explanation to determine how the exception should be handled.

Possible outcomes:

- Exception is unexpected/unapproved
  - Result: Issue is logged

- Exception is expected/approved
  - Result: Issue processed as routine or mass change
Routine Change Processing

Activity Description:
When an employee wants to make a routine change to a governed CoA Value, he or she submits a request via an online form. The request must receive necessary approvals before the update is administered in the global CoA.

Frequency:
As needed (typically 1-2 a month per LBOR)

Roles Involved:
• Local Requester and Approver
• Data Owner
• CoA Governance Process Owner
• CoA Governance Administrator
• Local Data Administrators

To learn more about the specific tasks associated with this process, please access the job aids available on the CoA Governance Portal.
Simplified Process – Routine Change

When a routine update is desired:

- **Local Requestor** submits a change request using the online form.
- **Local Approver** reviews the request.
- **Data Owner** reviews the request.
- **Process Owner** reviews the request.
- **CoA Governance Administrator** updates the value in the appropriate systems to administer the change to the CoA.
- **Local Data Administrator** updates the value in the ERCR.
More on Routine Change Approval

Requestors and Approvers:
- Local Approvers and Data Owners may also generate change requests.
- At each level of approval, there will be a primary and backup Approver.

Escalations:
- If primary Approver does not respond in 24 hours, the request goes to the backup Approver.
- If backup Approver does not respond in 24 hours, a notification is sent to the C&G Governance Administrator.

Did You Know...?
If you are an Approver, you can assign yourself as backup Approver and set up your availability in the Worklist tool so that items are automatically routed to your backup when you are unavailable.
Mass Change Processing

Activity Description:
To request a mass change to governed CoA Values, an employee must submit an request using a mass change request form. The Administrator helps to complete the mass change upload template and obtain approvals.

Frequency:
As needed (typically 1-2 a year)

Roles Involved:
- Local Requester and Approver
- Data Owner
- CoA Governance Process Owner
- CoA Governance Administrator
- Local Data Administrators

To learn more about the specific tasks associated with this process, please access the job aids available on the CoA Governance Portal.

Examples of mass changes include acquiring Monaco and reorganizing Trucks.
Simplified Process – Mass Change

When a mass update is desired:

Local Requestor submits a mass change request.

CoA Governance Administrator helps to complete the mass change template.

Local Approvers, Data Owners, and Process Owner review the request.

CoA Governance Administrator administers the changes to the CoA by loading the mass change request into Hyperion DRM and publishing updates.

Local Data Administrator updates the values in the LBOR.
Issue Management

Activity Description:
CoA Governance process issues will be reported and tracked using an online form, log, and a variety of reports. Process issues include problems such as review/approval delay or unexpected changes.

Frequency:
As needed

Roles Involved:
- Local Requestor
- Local Approver
- Data Owner
- CoA Governance Process Owner
- CoA Governance Administrator

Did You Know?...
Technical issues are not in scope for CoA Governance issue management.

To learn more about the specific tasks associated with this process, please access the job aids available on the CoA Governance Portal.
Simplified Process – Issue Management

When an issue arises:

Local Requestor, Local Approver, Data Owner, Process Owner, or CoA Governance Administrator report issue via SharePoint.

CoA Governance Administrator reviews the issue.

CoA Governance Administrator and Process Owner create an action plan for resolving the issue.

CoA Governance Administrator documents solution on SharePoint.
Performance Reporting

**Activity Description:**
The CoA Governance Administrator runs periodic performance reports to monitor CoA Governance activities. Performance reporting is closely tied to issue management as reports may reveal new process issues.

**Frequency:**
Ad hoc, weekly, monthly, or quarterly

**Roles Involved:**
- CoA Governance Administrator
- Local Approver
- Data Owner
- CoA Governance Process Owner

To learn more about the specific tasks associated with this process, please access the job aids available on the CoA Governance Portal.
Available Resources

- **CoA Governance Portal**
  - Roles and Contacts
  - Issue Management
  - Mass Change/Misc Requests
  - Training/Job Aids
  - Process Inventory
  - Related Tools and Templates
  - Performance Reporting

- **CoA Governance Process Owner – for Process Support**
Review of Key Points

Here are some key points to remember:

- CoA Governance includes a number of activities to support Finance Transformation and improve financial data reporting through a streamlined, global CoA.
- New processes establish formal request and approval guidelines for all changes to governed values.
- Issue management and performance reporting help to monitor these processes.
Assessment Instructions

The assessment includes five questions. You must receive an 80% on the assessment to pass the assessment and complete the course.

If you do not pass, you will be able to retry the assessment.

To navigate through the assessment, use the 'PREV' and 'NEXT' buttons at the bottom of the question screen.

After you answer all of the questions, click the 'SUBMIT ALL' button to see if you passed.
APPENDIX I – MY APPLICATION OF THE NINE EVENTS OF INSTRUCTION

**Project:** All  
**Description:** In this appendix, I summarize how the Nine Events of Instruction did or did not apply to each major project.

### Event 1: Gain Attention

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
</table>
| Accenture Human Resources Compensation Tool  | Somewhat                             | • Most of the technical documents that I created did not include attention-grabbing elements.  
• When I created the Compensation Tool User Guide, I designed the template to be visually interesting to help capture the audience’s attention.                                                                                                                                                                                                                           |
| Business Automobile Revisions                | Yes                                  | • When updating the courses, I worked with a graphic artist to design introductory slides with simple Flash animations.  
• The courses also included animated text, images of automobiles and people (representing the client’s employees and customers), and sound effects. (Note: These courses were already built before I updated them as part of my internship work. While I did make some updates, I did not significantly alter the courses.) |
| Medicare Reporting Training                  | Yes                                  | • I started the ILT presentation with a course welcome slide to gain attention.  
• Prompts within this slide facilitated instructor and participant introductions to help break the ice and prepare participants for an interactive course.                                                                                                                                                                                                                                               |
| Chart of Accounts Training                   | Yes                                  | • In the eBriefing course, I included an executive welcome slide featuring the executive’s image and recorded audio of the executive reading a welcome message.  
• For the ILT course, I drafted high-level talking points for a stakeholder welcome. One of the key members of the client’s project team spoke at the training session to emphasize the important role the learners would play in the success of the implementation.                                                                 |

112
### Event 2: Inform Learners of Objectives

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
</table>
| Accenture Human Resources Compensation Tool | Yes                                  | • I included purpose statements at the beginning of the deliverables (when appropriate based on the document template) to explain the intended audience and focus of the document.  
• When creating the Configuration Design, Introductory Training Presentation, and Compensation Tool User Guide, I included objectives and forecasted the topics.                                                                                                                                                                                                                           |
| Business Automobile Revisions                | Yes                                  | • The course introductions included slides to describe learning objectives, course features, completion requirements, and topics.  
• The course conclusions restated the learning objectives to reinforce the key points of the training.  
(Note: These courses were already built before I updated them as part of my internship work. While I did make some updates, I did not significantly alter the courses.)                                                                                                                                                                                                                       |
| Medicare Reporting Training                  | Yes                                  | • In the ILT presentation, I included course objectives and a course agenda.  
• In the demonstration guide, I included an introduction to state the purpose and intended use of the guide. I also provided a table of contents to forecast the activities.                                                                                                                                                                                                                                                   |
| Chart of Accounts Training                   | Yes                                  | • In both courses, I included slides to state the course purpose and learning objectives.  
• In the ILT course, I included a course agenda slide.  
• For the eBriefing, I designed the template so that the list of topics displayed in the top right corner of the slides at all times.                                                                                                                                                                                                                                                                  |
## Event 3: Stimulate Recall of Prior Learning

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
</table>
| Accenture Human Resources Compensation Tool | Somewhat                            | • This event did not apply to the technical documents.  
• For the Compensation Tool User Guide, I assumed that the audience would have prior knowledge of their company’s policies and referenced these within the document. |
| Business Automobile Revisions        | Yes                                 | • The first course was for an audience of both new and existing business automobile agents and did not assume prior knowledge.  
• The second course built upon the first course, helping learners to remember key information as they learned new content.  
(Note: These courses were already built before I updated them as part of my internship work. While I did make some updates, I did not significantly alter the courses.) |
| Medicare Reporting Training          | Yes                                 | • I presented changes to the client’s reporting process in terms of the current process versus the new process.  
• I included discussion questions to give learners an opportunity to compare the new and existing process and how these changes would impact them. |
| Chart of Accounts Training           | Yes                                 | • Prior to taking the eBriefing course, learners had already seen change management communications around the high-level Finance Transformation program. In the eBriefing, I reviewed the key points about the program.  
• The eBriefing was the prerequisite for the ILT. In the ILT, I included a review of content from the prerequisite course to reinforce that information. |
### Event 4: Present the Content

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
</table>
| Accenture Human Resources Compensation Tool  | Yes                                  | • In the Compensation Tool User Scenarios document, I organized the scenarios into logical groups based on the user audience and ordered the key steps into tables that would be easy for the reader to scan.  
• In the Training Design presentation, I created a series of flow charts to illustrate the appropriate training curriculum for particular learner groups. |
| Business Automobile Revisions                | Yes                                  | • The course glossary defined policy terminology for new agents, without including long definitions in the slide text.  
• One of the courses included an interactive, click-to-reveal map of the United States. Learners could click on highlighted states to view the specific insurance requirements for that location. |
| Medicare Reporting Training                  | Yes                                  | To present content on the basic process the client was implementing, I created a simple process flow diagram in PowerPoint.                                                                                                                                                                                                           |
| Chart of Accounts Training                   | Yes                                  | • For the eBriefing, I used a series of process flow diagrams to illustrate new processes, calling out steps for various groups within the course audience.  
• I included discussion prompts for the ILT to encourage learners to react to the content and ask questions.  
• In both courses, I created organization charts to present the various roles and responsibilities related to the Chart of Accounts. |
## Event 5: Provide Learning Guidance

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture Human Resources</td>
<td>Somewhat</td>
<td>• Most of the deliverables I created were not training documents and did not provide learning guidance.</td>
</tr>
<tr>
<td>Compensation Tool</td>
<td></td>
<td>• In the Compensation Tool User Guide, I included tips and best practices as sidebars throughout the document to provide additional guidance for users working in the system.</td>
</tr>
<tr>
<td>Business Automobile Revisions</td>
<td>Yes</td>
<td>• These courses included a set of three content expert characters that provided tips and emphasized important information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The courses also featured simulated conversations between two characters to present supplementary content.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Note: These courses were already built before I updated them as part of my internship work. While I did make some updates, I did not significantly alter the courses.)</td>
</tr>
<tr>
<td>Medicare Reporting Training</td>
<td>Yes</td>
<td>• In the ILT presentation, I included several question and answer breaks so that the instructor could provide learning guidance.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the demonstration guide, I based the activities on realistic scenarios that learners would encounter in the system.</td>
</tr>
<tr>
<td>Chart of Accounts Training</td>
<td>Yes</td>
<td>• For the eBriefing, I included tips and callouts to emphasize important information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the ILT course, I designed short instructor demonstrations to cover the key procedures that learners would need to complete.</td>
</tr>
</tbody>
</table>
## Event 6: Elicit Performance

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture Human Resources Compensation Tool</td>
<td>No</td>
<td>Not applicable – The deliverables I created for this project did not include treatments to elicit performance from the audience.</td>
</tr>
</tbody>
</table>
| Business Automobile Revisions                 | Yes                                  | • The course included a few optional checkpoint questions so that learners could check their understanding of the course content.  
  • These questions included multiple choice, multiple answer, and matching questions.  
  (Note: These courses were already built before I updated them as part of my internship work. While I did make some updates, I did not significantly alter the courses.) |
| Medicare Reporting Training                   | No                                   | Not applicable – The course requirements did not include checkpoint questions. While the course did include an instructor demonstration, system access constraints prevented me from including system practice activities for the learners. |
| Chart of Accounts Training                    | Somewhat                             | • I did not include checkpoint questions in the eBriefing, based on the client’s template.  
  • Within the ILT, I included several checkpoint questions to keep the learners engaged and ensure that they retained key content points. |
## Event 7: Provide Feedback

<table>
<thead>
<tr>
<th>Project</th>
<th>Did the Event Apply to this Project?</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture Human Resources</td>
<td>No</td>
<td>Not applicable – The deliverables I created for this project did not include treatments to provide feedback to the reader.</td>
</tr>
<tr>
<td>Compensation Tool</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Automobile Revisions</td>
<td>Yes</td>
<td>After submitting answers to the checkpoint questions, learners received instant feedback.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Note: These courses were already built before I updated them as part of my internship work. While I did make some updates, I did not significantly alter the courses.)</td>
</tr>
<tr>
<td>Medicare Reporting Training</td>
<td>Somewhat</td>
<td>In the ILT, I included question and answer breaks to allow learners to confirm their understanding of the course content and receive immediate confirmation or clarification from the instructor.</td>
</tr>
<tr>
<td>Chart of Accounts Training</td>
<td>Somewhat</td>
<td>• Not applicable to the eBriefing – This course did not include feedback, as there were no checkpoint questions or skills tests.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the ILT, I included checkpoint questions for learners to answer during the live session. The instructor displayed the correct response and provided the rationale for why the answer was correct.</td>
</tr>
</tbody>
</table>
## Event 8: Assess Performance

<table>
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<tr>
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<tbody>
<tr>
<td>Accenture Human Resources</td>
<td>No</td>
<td>Not applicable – The deliverables I created for this project did not assess performance.</td>
</tr>
<tr>
<td>Compensation Tool</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Business Automobile Revisions    | Yes                                  | • When updating the courses, I wrote assessment tests to determine whether or not the learners had mastered the course content.  
• The assessments provided both correct and incorrect feedback. After completing the assessment, the learners could view their score to see if they had passed or failed the exam. |
| Medicare Reporting Training      | No                                   | Not applicable – This course did not include a formal assessment or skills test.                                                            |
| Chart of Accounts Training       | Somewhat                             | • For the eBriefing course, I developed a brief assessment based on the client’s requirements. Learners had to pass the assessment in order to receive credit for the course.  
• Not applicable to the ILT course – This course did not include a formal assessment. |
### Event 9: Enhance Retention and Transfer to the Job

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<tbody>
<tr>
<td>Accenture Human Resources Compensation Tool</td>
<td>Somewhat</td>
<td>• Not applicable to the technical documents – These deliverables are essentially on-the-job tools themselves.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the Introductory Training Presentation, I listed Accenture contacts and additional resources to help the audience learn more about the Compensation Tool after the training.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the Training Plan document, I included technical contact information and suggested next steps for implementing the plan.</td>
</tr>
<tr>
<td>Business Automobile Revisions</td>
<td>Yes</td>
<td>Throughout the course, I embedded links to the actual policy forms, as learners would need to reference these on the job.</td>
</tr>
<tr>
<td>Medicare Reporting Training</td>
<td>Yes</td>
<td>• I provided a job aid for learners to use as a template for collecting Medicare information when documenting a claim.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• At the end of the course presentation, I included a slide to explain how the client would implement the new procedure and what actions the learners should take.</td>
</tr>
<tr>
<td>Chart of Accounts Training</td>
<td>Yes</td>
<td>• Throughout the courses, I included links to related job aids.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• At the end of the courses, I included the suggested next steps for applying the process changes.</td>
</tr>
</tbody>
</table>