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Abstract:

While e-learning has become accepted in large companies as a standard option for training, most corporate e-learning has not produced the hoped-for performance improvement. Yet e-learning has a tremendous amount of unrealized potential to provide high-quality, educationally-sound, engaging training that improves employees' performance. Corporate e-learning's lack of success seems to be due to the dearth of widely-publicized methods to teach skills needed by corporate employees, and by the perceived technical difficulty in creating engaging, effective e-learning such as simulations. In this paper, I describe a learn-by-doing simulation methodology to teach customer service skills, and an e-learning authoring tool based on that methodology that is easy for trainers to use, along with future generalizations of the method and tools to other skill areas.

1 Introduction

While e-learning has become accepted in large companies as a standard option for training, most corporate e-learning has largely been considered disappointing, as it has not produced the hoped-for performance improvement. Instead of greatly improving employee performance, most corporate e-learning has simply found its place among other low-impact training methods. Yet e-learning has a tremendous amount of unrealized potential to provide high-quality, educationally-sound, engaging training that improves employees' performance.

One major reason that this potential has not yet been met is the lack of adoption of proven methodologies that work effectively educationally—while a number of methods have been developed, they have not been well-publicized, so in practice, trainers are often left to come up with their own methods. To compound this problem, most corporate trainers have primarily classroom-training experience, so they do their best to translate from their classroom experience to a very different online world. Such "translation" fails to take advantage of the possibilities of online learning. A second major barrier preventing corporate e-learning from being successful is the technology barrier: most of the more innovative and effective e-learning methods can be expensive and difficult to implement.

One way to address both of the above issues, and to facilitate the development of effective, engaging e-learning, is develop methodologies that teach certain tasks and skills, and then build the methods into an e-learning authoring tool that is easy for trainers to use. In this paper I describe both a methodology and authoring tool, focusing on customer service training, which is a widespread need in many companies worldwide.

2 The Learning Methodology

2.1 Customer Service Training Needs

A large number of companies provide "customer service" directly to their customers, either via telephone or Internet, or in-person (as in the case of retail stores). Most customer service involves dealing with customers' questions or, more often, problems, and the majority of customer service agents are fairly inexperienced—customer service positions typically have high turnover. Yet customer service is incredibly important to a business and plays a major role in influencing customer perceptions of the company. To further complicate things, a good customer service agent possesses some general customer service skills, such as understanding how to be polite, or to calm an angry customer, but also significant company-specific skills, including knowing the company policies, style, preferred wording, and even "scripts" to use to speak with customers.

The financial significance of high-quality customer service, combined with the high turnover, results in a substantial training need for many companies, on a regular basis and particularly, for many retailers, during the peak holiday shopping season.

2.2 Training Philosophy

The method we chose, based on years of experience creating online training and on educational research (see Brown, Collins, & Duguid, 1989), was learning by doing. Under this method, employees learn by practicing realistic scenarios—for customer service, that means "interacting" with simulated customers—in a "safe" online environment. A learn-by-doing simulation facilitates transfer to the actual job, since the employees learn skills in-context and in the way they will need to apply them in practice. This method also allows employees to learn from their mistakes, but in a safe, simulated environment, without consequences such as alienating actual customers. Finally, this method includes a coaching component to provide guidance and feedback to the learner. This "procedural" learn-by-doing method has proven to be successful on a number of projects, dating back to its first application to corporate training problems (Guralnick, 1996), and later applications as described in Schank (1997) and Guralnick (2004, 2005).

2.3 Methodology Specifics

Under this method, learners play the role of a customer service representative for their company, taking simulated "calls" (in audio) or handling "customers" (in video or, if necessary for practical reasons, as a still shot with audio), as appropriate for their job. They are given a brief introduction to their role and goals, access to the company policy guide, and a coaching component to help answer their questions and intervene occasionally on mistakes. The learner then must handle simulated customer interactions—for example, an angry customer in video who is upset because the shoes he purchased are falling apart after only three weeks At each "turn" in the conversation, the learner must choose from several options regarding what to say to the customer. The customer will then respond, again in audio or video. When the learner makes a poor choice, he may see the customer's reaction (thus getting feedback in a realistic way), and will also receive an intervention from the coach (to help him better understand the mistake and how to generalize it).

3 The Authoring Tool

3.1 Goals and Design Principles

In order for this methodology to achieve widespread adoption, there must be a simple way for corporate trainers, who are generally responsible for this type of training, to create customized

simulations to teach their company's content and situations. We have designed a Web-based authoring tool for exactly this purpose; its goals are to allow trainers to create such simulations quickly and easily, and in a way that fosters good instructional design, since most corporate trainers, even today, are experienced in classroom training and the writing of training manuals rather than in scenario-based learning. Several key principles underlie the design of this tool:

- The audience is non-technical, so the tool must be very simple to use
- The tool should use a vocabulary of training – words such as "coaching" rather than technical terms such as "data fields"
- The tool should support the creation of educationally-sound training, by providing structures that support the learn-by-doing methodology that has been successful in the past, and an end-user simulation interface that has been proven to be highly usable.

By doing the above, we are able to provide a tool that encourages and allows corporate trainers to make substantial use of learn-by-doing simulations for customer service training.

3.2 Authoring Tool Overview

The authoring tool has a simple, form-based interface, in which authors can easily enter and edit scenario information such as the name, correct and incorrect options the learners can take in each turn, and coaching information. The authoring tool has three primary authoring areas:

- Site information: this includes interface customization, such as the company logo, and introductory text for the learner.
- Scenario information: Each scenario represents a customer situation that the learner will need to handle; the author enters the scenario name and sets up the "pages," or conversational turns, here. A scenario may have any number of turns, and any number of different paths depending on the learner's choices.
- "Page" information for a turn in the scenario: This covers the details for each specific conversational turn, including the customer video or audio clip, the choices the learner may take, and the coaching guidance and feedback.

The time required to technically build a scenario using the tool is quite short, just a matter of minutes, thus allowing trainers to focus their time on good scenario design.

4 The Future/Conclusion

The rollout of this methodology and tool is a major step toward widespread implementation of engaging, pedagogically-sound corporate e-learning. We already envision and, in some cases, have begun work on, several lines of additions to the tool and methodology. Those include:

- Additional methods and variations to address other common corporate skill sets, such as different sales situations;
- More flexibility in terms of the coaching guidance and feedback offered by the tool;
- More design support for the trainers, such as providing annotated examples of sample training simulations and providing an educational component for the trainers;
- The eventual establishment of an online community for trainers to share information, ideally focusing more on pedagogy than on the tool itself.

Our hope is that over a period of time, more and more methods for different situations will be developed and built into the tool, providing corporate trainers with the ability to build engaging, effective online learning in an efficient way, and allowing e-learning to finally make a significant impact on the performance of many corporate employees.

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